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Strata Call Manager
User Guide

January 2012

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Introduction

This user guide describes how to use the Toshiba Strata Call Manager (SCM) software with Strata CIX1200, CIX670, CIX200, CIX100 and CIX40 telephone systems:

Organization

- **Chapter 1 – The Grand Tour** provides an overview of the Strata Call Manager application.
- **Chapter 2 – Using Strata Call Manager Features** shows how to use telephone features with SCM.
- **Chapter 3 – Preferences** defines settings that are available and can be changed by the user to meet their needs.
- **Chapter 4 – Buttons** shows how to use and add, delete or edit button and button banks.
- **Chapter 5 – Actions** includes instructions for setting up various actions.
- **Chapter 6 – Personal Call Handler** explains all the details regarding this feature.
- **Chapter 7 – Using Microsoft Outlook** explains the interactions between Strata Call Manager and MS Outlook.
- **Chapter 8 – Using Companion Applications** explains how to use applications such as Contacts, History, ACD Viewer, Chat, Dialer, Buttons, and Web Browser.

Conventions

Conventions	Description
Note	Elaborates specific items or references other information. Within some tables, general notes apply to the entire table and numbered notes apply to specific items.
Important!	***Calls attention to important instructions or information.***
Extension Number	Press to answer a call to the Extension Number. Each station can have multiple extension buttons. Incoming calls ring the extension button(s) from the top down. For example, station 10's extensions ring 10-1 first, then 10-2, 10-3, and 10-4. A station is considered busy when all extensions are being used. **Note** The naming convention for DKT assignments within Toshiba is Directory Numbers. For clarity and ease of understanding, the terms Extension Number and Phantom Extension Number will be used in this document in lieu of PDN and PhDN.

Conventions	Description
Arial Bold	Represents telephone buttons.
+	Shows a multiple PC keyboard or telephone button entry. Entries without spaces between them show a simultaneous entry. Example: **Delete**+**Enter**. Entries with spaces between them show a sequential entry. Example: # + 5.
Tilde (~)	Means “through.” Example: 350~640 Hz frequency range.
See Figure 10	Grey words within the printed text denote cross-references. In the electronic version of this document (Library CD-ROM or FYI Internet download), cross-references appear in blue hypertext.

Related Documents/Media

Note: Some documents listed here may appear in different versions on the CD-ROM or in print. To find the most current version, check the version/date in the Publication Information on the back of the document’s title page.

Refer to the following for more information:

- Strata Call Manager System Administrator Manual
- Strata Call Manager On-line Help

The Grand Tour 1

The Strata Call Manager works with Net Server to provide a powerful "PC-Phone" to enhance productivity for telephone users.

The Strata Call Manager is designed to run on a PC with Microsoft® Windows XP, Windows Vista, Windows Server 2003, Windows Server 2008, or Windows 7 operating systems connected to a standard TCP/IP network with the Net Server. The Net Server must be installed with the proper software license(s) for Strata Call Manager to operate correctly. Strata Call Manager will operate in Demo Mode if the appropriate licenses are unavailable. Demo mode lets you use the software for Demonstration purposes only for a limited period of time.

Strata Call Manager provides the following major functions:

- It allows you to place, answer, handle, view, and manage phone calls using your computer screen, keyboard, and mouse.
- Using the VoIP Audio capabilities can provide a complete speech path when using a PC with the proper speech component support.
- Rules and actions can be set up to automatically activate when calls arrive even while you are away.
- It can easily interface with many popular programs (like Microsoft Outlook, Goldmine, ACT, etc.). This allows you to dial from and “screen-pop” into these programs or the Internet / Intranet.

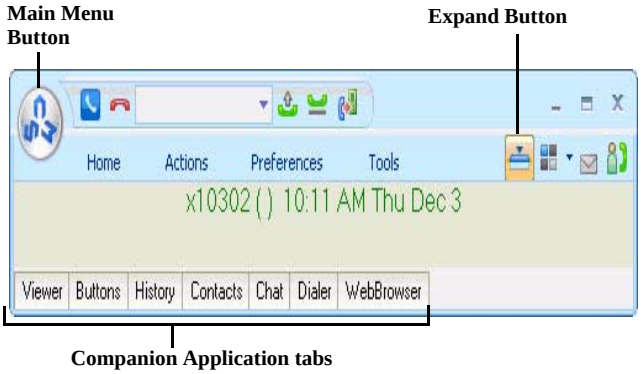
The Main Screen

This section gives an overview of the main user interface of the Strata Call Manager, including the buttons, displays, and indicators, which allow you to easily and efficiently operate your phone. Strata Call Manager provides two views, Compact and Expanded, allowing you to operate using only the space on your screen that you want.

Note: You can easily change the color scheme of your Strata Call Manager by clicking drop down next to the Set the color scheme icon. The color options are Blue, Silver or Black.

The Compact View

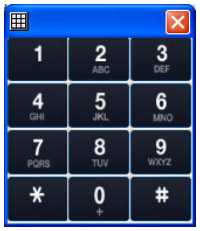
In “Compact” view Strata Call Manager consumes minimal screen space but still provides the user with indictors, information, and buttons to effectively operate the phone. This view is most effective when users handle one call at a time, or have very little available screen space. Below is a sample view and information about the various parts of Strata Call Manager.



Note: The button information below is independent of the compact or expanded view. However, the buttons that are visible in the compact view are explained first and the additional buttons are explained in the Expanded view section.

Button / Icon	Description
Main Menu	Click this button to access Strata Call Manager configuration menus and Help.
Minimize Button	Hides Strata Call Manager into the system tray. Double-click on the Strata Call Manager icon (shown right) in the system tray to return the Strata Call Manager to the screen.
Maximize Button	Used to change the phone to/from its “Compact” view and its “Expanded” view.

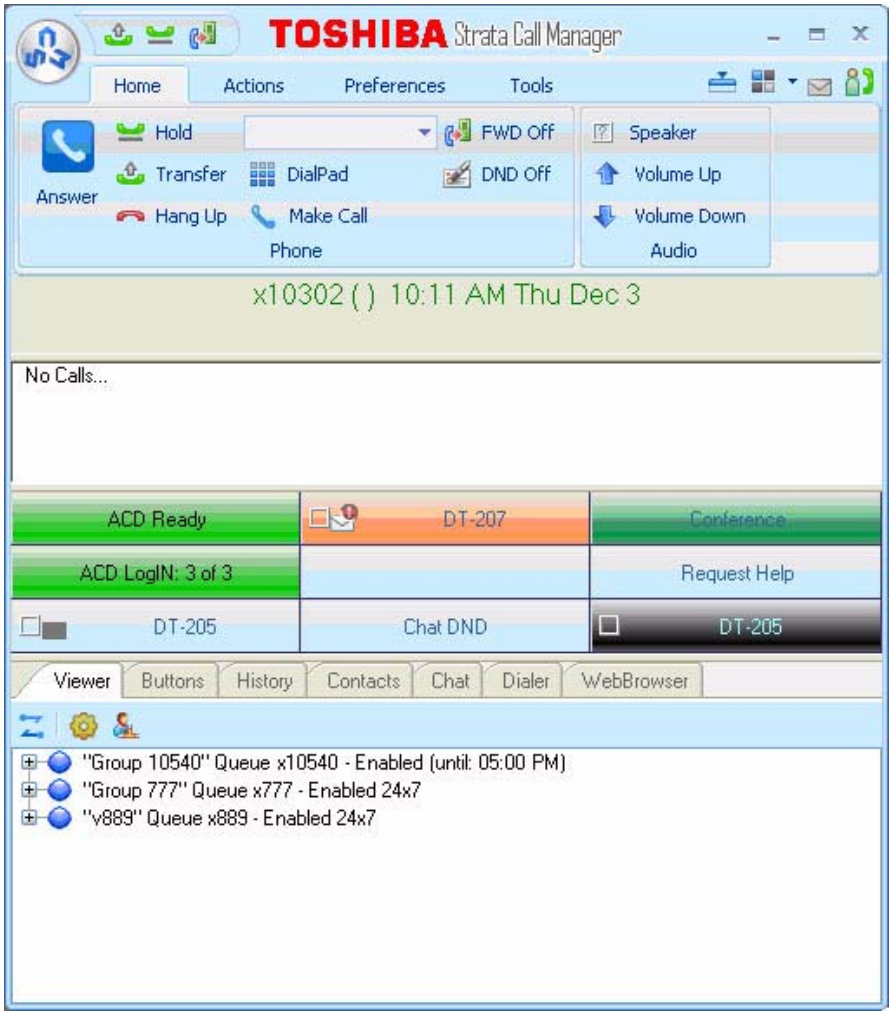
Button / Icon	Description
Tabs – Home, Actions, Preferences, Tools	The tabs control various functions and settings. • Home – has some of the basic telephone functions, such as Make Call, Answer, Hold, Transfer, Hangup, Forward, DND On/Off. • Actions – contains the tools to create, copy, edit/test, and delete user defined actions. • Preferences – contains General configuration, Hot Keys, Dialing, and Docking. It also has tab settings, such as Add, Update, Delete, and Revert. • Tools – contains calls and events information.
Icons on the Right	(L to R): Toggles compact and expanded mode, color scheme, voice message indicator, open personal call handler. These functions are explained below or in other chapters.
Information LCD Display	This window simulates a phone LCD and provides different types of information depending on current status. If your phone is idle, it shows the date/time, Extension number, and current Name. While a call is active on your phone it shows information about the call – Duration, CallerID or Name (if present.) When a call is active in the window, right-click on the LCD to access to popup a menu of call control options.
Message Waiting Indicator	This indicator blinks a Red light above the envelop icon (shown left) when you have messages waiting.
Side Window Rollout Button	Press this button to show a side window that has additional programmable buttons.
Companion Application tabs	A number of optional companion programs can be configured to add significant functionality to the Strata Call Manager. Each Companion Application is docked in the pane at the bottom of Strata Call Manager to provide easy access to the features/functions of the application.
Home Phone tab	The first four keys allow you to (from left to right) Answer, Hold, Transfer, and Hang up a call. Should you forget, you can hover your mouse over a key to be reminded what function a key performs.
Do-Not-Disturb Key and Indicator	Displays the current Do Not Disturb status of your phone. Hover the mouse over this area to see the current DND status message. Click to change your DND status and message.
Call Forward Key and Indicator	Displays the current “PBX call forwarding” status for your phone. Hover the mouse over this area to see the entire FWD status. Click to change your PBX forwarding status and destination.

Button / Icon	Description
Dial Pad Button	Click the dial pad button to expose and hide the popup Dial Pad. Use the Dial Pad when you reach a recording that says "...Press 1 for sales, 2 for support,...". When this dial pad is displayed you can use your mouse to click the digits to dial or use the number keys or NumLock keypad on your computer keyboard to dial digits. 
Make Call Button	Click the Make Call button to dial the number shown in the Dial Buffer.
Dial Buffer and Redial Selection	Type a number into this space and press Enter or click the "Dial" button to the left of the box. Click the drop-down arrow to view the last 10 outside phone numbers you dialed. Select a number from the drop-down and press Enter or click Dial to redial that number. You can even Copy/Paste phone numbers from other programs into this window to dial. You may also include letters in the dial number – Strata Call Manager automatically converts the letters to the matching numbers on the telephone keypad (i.e. 1-800-IFLYSWA).
Volume Controls	These buttons control the volume when the VoIP audio interface is used.
Audio Control	The audio control is your line button with a status indicator for that line when using the VoIP audio interface. Right click the button to see the Audio Configuration menu.
Recording Button & Indicator	The indicator light works in conjunction with OAISYS Tracer and OAISYS Auto Call Record. Users with appropriate permissions will have this indicator on their Strata Call Manager. If the light is red, this means the user's call is currently being recorded. If the light is gray, it is not being recorded. The user can click on this button and select 'Start Recording' to initiate recording of the call. If the call is being recorded the user can click on the button to terminate the recording.

A number of shortcut keys allow you to use the keyboard in place of the mouse to control Strata Call Manager. The list of Shortcut keys can be found using the menu selection Setup>Shortcut Keys. Note: The F1 key is the HELP key a can be pressed at any time to access the Help document.

Expanded View

In “Expanded” view the Strata Call Manager is enlarged beyond the compact view to provide the user with additional buttons, indictors, information to manage multiple simultaneous calls and to access many other features. The follow describes the additional items in the “Expanded” view.



- Streamline Button – Used to change Strata Call Manager back to its “Compact” view.
- Calls Window – This window displays that status and associated information for each active phone call on the phone. Thus you can easily view and manage multiple phone calls. Right click the mouse on any call to view a menu of options for handling the call (like Hold, Transfer to Voice Mail, Hang Up, etc.).
- Call Info Indicators – on the right side of the Call Window is a “Call Info Indicator” that indicates if Extra call information is attached to a call. A gray notebook icon means no information is attached, a blue notebook icon means standard information is attached, and a red notebook icon indicates priority information is attached to the call. Press the Call Notes icon to view or change Notes information on the call. Notes are retained with the call even when you transfer it to another person. You may use Call Notes with an IVR to attach a Customer Name, Credit Card Number, and Zip Code to the call before you answer, saving you from asking the caller for this information.

- Programmable Buttons – A number of keys can be easily configured by the user as “Feature” keys, “Speed Dial” keys, “Call” keys, “User Action” keys, etc. To change one of these keys simply Right-click the mouse over the key and use the Setup Key window to configure the settings for the key.
- ACD Buttons – ACD keys are programmable buttons that would give ACD agents easy login/logout of ACD groups. These keys also display the current ACD agent status, and allow agents to control their Wrap-Up mode.

Screen Docked Views

Strata Call Manager provides a screen-docking feature where the Strata Call Manager can dock to the top or bottom of your PC screen. When screen docked the Strata Call Manager takes on a very low profile using only a small portion of the screen, and stays accessible even when other applications are maximized. This allows user’s to access the features of Strata Call Manager while consuming a minimal amount of PC screen space as shown below. This is not the default, the default docked profile is the regular expanded view.

Screen-docked profile

Most of the phone display, buttons, and controls that appear on each screen-docking profile can be chosen by the user from the “Docking Tab” on page 31 in Strata Call Manager Preferences.

Strata Call Manager Main Menu

To reach Strata Call Managers Main Menu, click on the SCM icon/menu in the upper left-hand corner. The Main Menu opens as shown below:

The Main menu screen menu item expands into an ability to Change the Login settings, an ability to reset the phone to its default settings, access help, and check the Call Manager version and serial number.

Shortcuts

You can use the Quick Access Toolbar or KeyTips to execute various commands. The QAT and KeyTips available in SCM are explained below.

Quick Access Toolbar (QAT)

The QAT (shown below) consists of frequently used tools that can be added to the top of the screen for easy access. You can add as many tools as you like. If there are too many to fit on your bar, the remaining ones will go into overflow.

In Compact mode the Answer, Hang up, and Dial Box tools are always available in the QAT. These three cannot be removed, but more tools can be added. However, you can change this configuration in Compact/Docked mode if you wish.

Compact Mode

Regular Mode

To add tools to the QAT, right click on an icon, then select “Add to Quick Access Toolbar.” To remove a tool from the QAT, right click on the icon, then select “Remove from Quick Access Toolbar.”

Note: Any pop up menu tools, such as Companion docking and color schemes cannot be added to the QAT.

KeyTips

KeyTips allow for easier keyboard navigation. Each tool on the Ribbon has a KeyTip assigned to it which you can navigate with using your keyboard. To begin, press Alt. Small boxes with letters inside appear over various tools on the ribbon. To use that tool, press the letter. For example, press 'Alt + C' to use the “Compact” button.

If the tool is a container-type tool (such as a Ribbon Tab, Drop-down menu, or the Application menu), pressing the associated KeyTip will show the KeyTips of tools in that container. From there, you can press another KeyTip to use a tool in that container, or press Escape to return “up” one level, showing the keytips from before. For example, press 'Alt + A' to transfer to the Actions ribbon tab, then press 'N' to launch the New Action dialog box.

Note: If you want a tool to be available without having to navigate the ribbon, you can add it to the Quick Access Toolbar. Tools on the QAT respond to Alt+1, Alt+2, etc.

Hot Keys

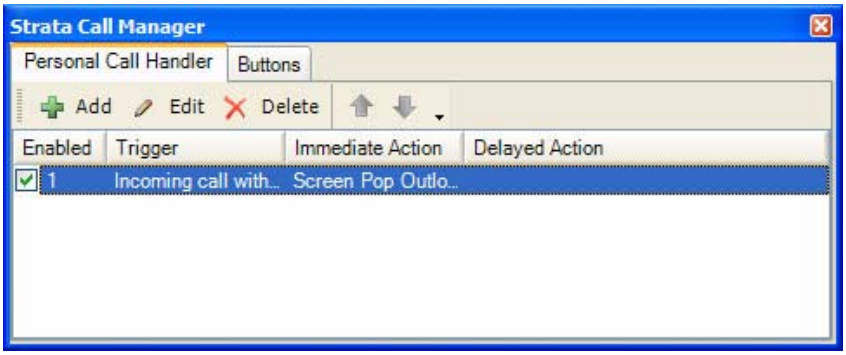
SCM also has “Hot Keys” for dialing and popping up (to quickly answer calls), which can be set in Preferences > Hot Keys.

The Side Window Screen

Click the “Side Window” button on the main screen to cause the side window to appear just to the right side of the main window or below when the main window is docked. The side window provides access to the Personal Call Handler window and additional programmable buttons can also be reached.

This window is docked to the side of the main window. You can move the side window around the screen, but whenever the main window is moved the side window will move with it. And likewise whenever the main window is minimized (into the system tray) or restored, the side window will move with it.

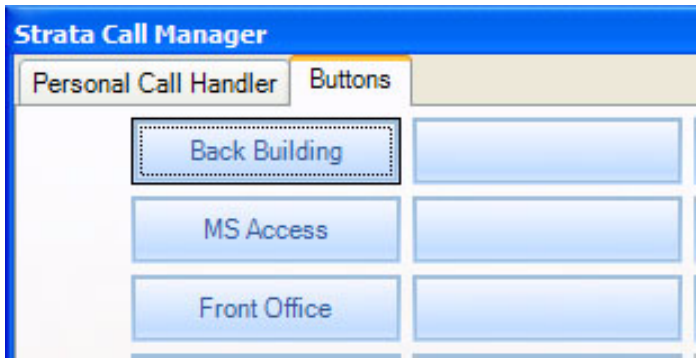
Call Handler Mode



- Call Handler Management Buttons – Used to Add, Change, or Delete Personal Call Handler rules.
- Close Button – Use to close the Call Handler window.
- Call Handler Rules Window – Displays the current Call Handler rules along with an enabled (checked) and disabled (unchecked) box per rule. The triggering event is show in blue text while the action to take place is shown in red text for easier viewing.
- Buttons tab – Use to switch the window from the “Call Handler” mode to the “Buttons” mode.

Buttons Mode

Below is a sample view of the side window screen in Buttons mode, which provides 25 user-programmable buttons for the user.



- User Programmable Buttons – A number of keys can be easily configured by the user as Feature keys, Speed Dial keys, Call keys, User Action keys, ACD keys, etc.

Companion Application Windows

Companion Application tabs open as the result of clicking one of the Strata Call Manager tabs. These windows open docked (connected) to the main window or can be undocked (moved away) from the main window. (Each side must be enabled in the “preferences/docking” drop down list). While a companion window is docked with the main window, whenever the main window is moved the companion window will move with it. And likewise whenever the main window is minimized (into the system tray) or restored, the companion window(s) moves with it.

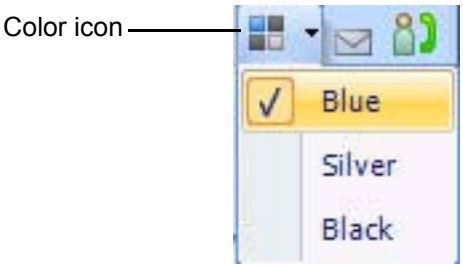
When companion windows are undocked, they float separately from the main window and can be moved and resized separately. Use the Fly out / Fly in icon (shown right) to dock and undock companion applications.

All companion applications can dock to the top, bottom, left or right side of the desktop. When docked, the companion applications can be arranged in various configurations (vertically, horizontally, pinned, unpinned). To dock a Companion Application window to one of these edges, first undock the window from the main window. Then, drag the companion application window until one edge overlaps the screen's edge. When you release the mouse, the application will dock to that edge.

You can drag multiple application windows to the same edge to place them in a shared dock. This will allow you to resize each window by dragging the splitter bars, or move it to a different position in the dock by dragging the application titlebar to various interior edges of the dock. The More Buttons companion application changes configuration to show in a single vertical column when docked, to allow a thin docked area which preserves screen area.

Screen Colors

The Strata Call Manager has three color schemes. To change the color of your display, click the Color drop down and select either Blue, Silver or Black.



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Using Strata Call Manager Features 2

This chapter defines how to use the Strata CIX features using Strata Call Manager. Features included are Call Handling, system, Call Center, and Microsoft Outlook features. Personal Call Handler (PCH) rules can be created to respond and take actions on calls automatically, or Programmable Buttons can be used for even easier access to many features.

Call Handling Features

Call Handling features include how to dial, answer, hold, transfer and hang up calls. It also includes how to view the Extra Call Information when attached to a call.

Making Outgoing Calls

Strata Call Manager supports a number of ways to place calls including open architecture links to other programs or contact managers, which can also be used to dial calls. The following are some of the typical ways to place a call using Strata Call Manager. Most of these functions are found on the Strata Call Manager Home tab.

Manual On-screen Dialing

1. Click within the dial number box and enter the number from the keyboard (shown below).
2. Press Enter when done to start the number to be dialed.

Re-dial a Recently Used Number

1. Pull down the list of numbers in the dial number box and select the number to dial.
2. Click the Make Call button to dial.

Using Strata Call Manager Dialpad

1. Click the dialpad button to expose the dialpad.
2. Enter the number to be dialed including a trunk access code; the call will proceed automatically once a valid number is entered.

Hot Key Dialing

1. Highlight a telephone number in another application.
2. Using the keyboard, press the key combination assigned for Hot Key Dialing. The call will proceed dialing the number highlighted.

Using Drag and Drop

- Use the mouse to drag and drop a call from either the Call History or Contacts tab list into the LCD Display window. The call will proceed to dial.

Using Contacts / Personal Speed Dial List

1. Click the Contacts Companion tab to open the contacts page, and navigate to a Directory or Group.
2. Make a selection from the listing and double-click the name to proceed dialing.

   or right-click on the selected name and choose Call Now to proceed.

Using Call History to Re-dial a Number

1. Click the History Companion tab.
2. Scan the list for a recently dialed number or look for a number of someone that called you.
3. Right-click on the line with the person to call and select Call Now

   or double-click on the line with the person to call.

Using Speed Dial User Button

- Click on a User Programmable button that has been programmed as a Speed Dial button. The call will proceed immediately.

Answering Calls

Typically the longest ringing calls are answered first, but calls can be answered in any order with a click of the button.

To Answer Oldest Call

- While a call is ringing, click the Answer button.

  or double-click on the top call in the Calls View Window.

  or press the Answer Hot Key (F9).

  Note: Strata Call Manager must have focus for the key to work.

To Answer Calls in Any Order

- Double-click on the selected call in the Calls View Window.

To Answer a Call while Talking (Call Waiting)

- While on an existing conversation, another call may ring. The existing call can be placed on hold and the ringing call answered.
- While talking on an existing call and another call rings in (not marked “Campon”), click the Answer button

  or double-click on the ringing call in the Calls View Window

  or press the Answer Hot Key (F9).

  Note: Strata Call Manager must have focus for the key to work.

Hang Up

Hanging Up or Disconnecting Calls

- When the call is completed, click the hangup button to disconnect the call

  or right-click on the call in the Call View Window and select Hangup.

  or press the Hangup Hot Key (F12). Note: Strata Call Manager must have focus for the key to work.

Holding Calls

To Place Call on Hold

- While talking with a caller, click the hold button to place call on hold

  or right-click on the call in the Call View Window and select Hold from the menu.

To Retrieve Call

- To re-connect a held call, click the hold button again

  or press the answer button.

  or double-click on the held call in the Call View Window

  or right-click on the held call and select Answer from the menu.

Transferring Calls

Using Transfer Button

1. While talking with a caller, click the transfer button to get intercom dial tone

   or right-click on the call in the Call View Window and select Transfer.
2. Using the keyboard enter the number to transfer the caller to, press Enter when done.

   or use the on-screen dial pad and dial the number. Once the system recognizes a valid number, the call will proceed automatically.

Using Drag and Drop

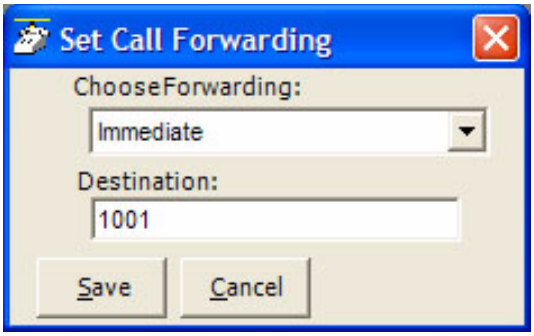
- While talking with a caller, use the mouse to drag and drop the call from the Calls Window onto a DSS button for immediate transfer to another station.

  or use the mouse to drag and drop the call from the LCD display window onto a DSS button for immediate transfer to another station.

Call Forwarding

To Set Call Forwarding

1. Click the FWD Off button.
2. Choose a Forwarding type from the pull-down listing (shown below).
3. Enter a Destination for the forwarded calls.



4. Click Save to compete the setting.

Note: Include the trunk access code for external numbers.

To Clear Call Forwarding

1. Click the.

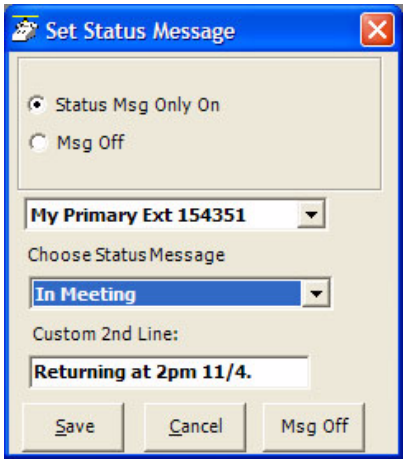
button
2. Choose <None> from the pull-down listing.
3. Click Save to remove the previous setting.

Status Messages and DND

Status messages and DND is available under the DND Off option.

Setting a Status Message

1. Click the DND Off button to bring up the Set DND or Status Message window. The following screen displays.



2. Change the selection to Status Msg Only On
3. Use the pull down listing and select a Status Message or Do Not Disturb.
4. When needed enter additional information on the Custom 2nd Line.
5. Click the Save button when done. The status message will appear on the DSS keys throughout the system.

Turning Off DND or Message Only

1. Click the MSG On button to bring up the Set DND or Status Message window.
2. Click the Msg Off radio button to remove either DND and/or the Status Message.

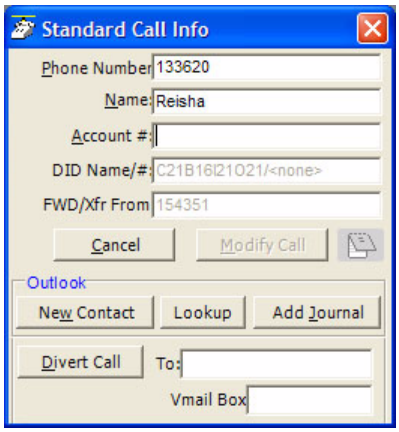
Viewing Extra Call Information

Strata Call Manager has the ability to attach, retain, and display extra information taken on a call. This could include information input by an IVR, added/attached information by the Call Router, attached from a database, or added by any user who handled the call. This information is retained with the call as it is transferred about in the phone system. The following Call Info icons are displayed in the Calls window or LCD Display to indicate the presence of additional information. The icon changes color depending upon the information available:

- – No call information attached to this call.
- – Normal call information attached to this call.
- – At least one field of priority call information is attached.

To View Call Information

Right click the “Call Info” icon on the right side of the Call key for the desired call. This window can contain many different fields depending on your configuration and the call information attached. Note: These windows can automatically popup whenever a new call arrives by using the Popup Call Info Screen action in the Personal Call Handler.



To Add or Change Information

1. With the “Call Info” window open, place the cursor into the box to be changed and use the keyboard to add or erase information.

Note: The ability to add or change information is controlled by Preferences > General > Extra Info settings.

2. Click the Update button to save the new information. Once changed, other programs will use this information. For example, the call is being screened and transferred into an ACD queue; the caller could define a Preferred Agent by entering an agent’s ID into the Preferred Agent Information field. When the call is transferred this information is available to be used by the ACD application.

To Copy Call Information to Another Application

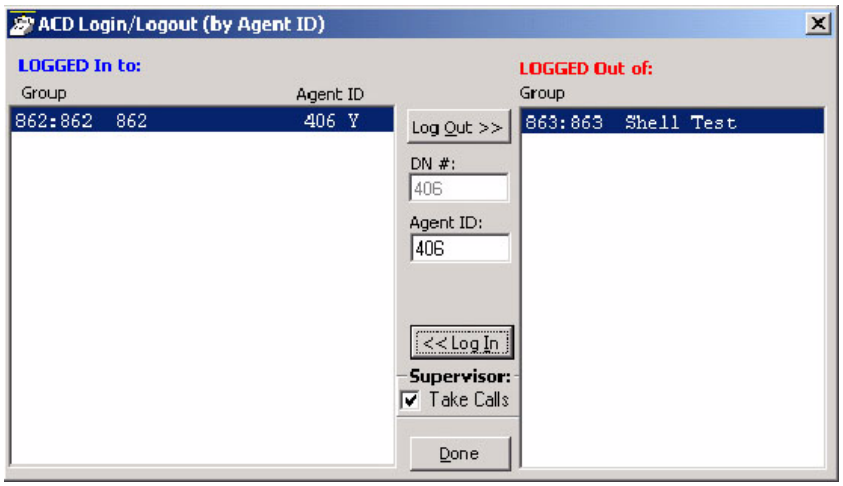
With the “Call Info” window open, click the Copy button to place that specific information on the Windows clipboard for pasting into another program. For example, the user may need to use the Customer number to look up the status of an order. Clicking Copy and switching to the other program and pasting into the appropriate field allows for a fast lookup.

Call Center Features

The ACD actions can be used to Log In / Log Out to/from ACD groups. Going temporarily unavailable and an ability to end wrap times can be part of the features available. Additional Call Center features are possible using User Programmable buttons.

Logging In or Out

Click the ACD Log button to open the ACD Login/Logout window.



Note: The right list box shows available groups for the identified agent number. The left list box shows groups currently logged into.

To Log Into or Out Of one or more groups

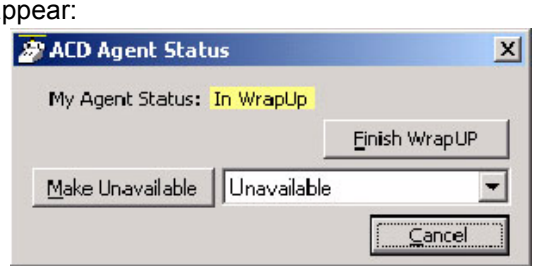
1. Highlight the group name(s) in the right-hand box and click <<Log In. If your Agent ID is listed as a Supervisor, then the Supervisor: Take Calls check box will be offered on your screen. Placing a check in this box will log you in to take calls for the group(s) selected when <<Log In was pressed.
2. Click Done when finished.
3. The ACD Key will display the number of ACD groups the extension is logged into and the total number of ACD groups you are a member.

To Log Out

1. Highlight the group name(s) in the left-hand box and click the >>Log Out button.
2. Click Done when finished.

Changing Agent Status

1. Click the ACD Status button. The following ACD Agent Status window will appear:



To Make Agent Unavailable

1. Use pull-down list and choose a reason.
2. Click the Make Unavailable button.
3. Click Done.

To Make Agent Available

1. Click the Make Available button.
2. Click Done.

To Set the ACD Status to Wrap-up

1. Click Set WrapUp button.
2. Click Done.

Note: The Set WrapUp button is NOT available on all installations.

To End WrapUp

1. Click the ACD Status button.
2. Click the End WrapUp button.
3. Click Done.

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Preferences 3

This section defines settings that are available to the user and can be changed to meet their needs. A number of additional settings are available for the System Administrator for setting more advanced features such as controlling access to some features, creating a server-based rules and configurations. This section will concentrate on the settings readily available to the user.

These settings are arranged under the Preferences tab (shown below), Hot Keys, dialing options, docking, and tabs settings. Each of these sections will define the settings and how to change these settings to match your needs.

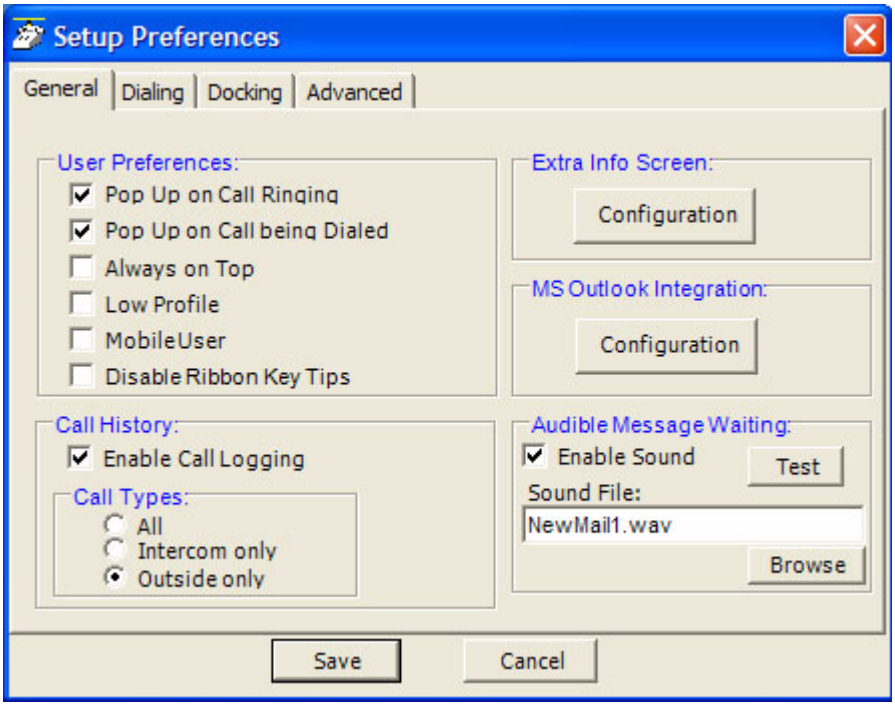
Config Settings

Preferences has a number of settings for making Strata Call Manager work and look the way you choose. To access Preferences click on Preferences tab. The settings in Preferences are divided between four tabs each defined below.

Note: Depending on your configuration you may not be able to change the Preferences, in which case you should check with your System Administrator.

General

These settings control how Strata Call Manager interacts with other Windows-based programs and how it should react when calls ring or are being dialed. Extra Call Information can be enabled and content to be displayed defined as well as details for Microsoft Outlook Integration when used.



User Preferences

- Pop Up on Call Ringing – Check this option if you'd like your Strata Call Manager to automatically pop up when a call rings on your phone.
- Pop Up on Call being Dialed – Check this option if you'd like your Strata Call Manager to automatically pop up whenever a call is being dialed from another program (via TAPI or DDE dialing) or dialed via Hot Key dialing.
- Always on Top – Use this option to keep Strata Call Manager on top of all other programs. This makes it easily accessible.
- Low Profile – Enabling this option makes the Strata Call Manager very thin in the “Streamlined Mode” by eliminating the Option Buttons on the bottom of the screen.
- Mobile User – some users travel with a laptop PC from desktop to desktop each time using the Strata Call Manager with a different PBX extension. This Mobile User option will pop up a “Login” screen each time Strata Call Manager is started so that they can log into the appropriate PBX phone extension.
- Disable Ribbon Key Tips – When this box is unchecked, pressing ALT while using SCM will popup the ribbon KeyTips, which allow you to access any tool with a few keystrokes. When checked, KeyTips will be disabled, allowing you to use the ALT key without them popping up.

Call History

- Enable Call Logging – To have Strata Call Manager collect and display Call History, Call Logging must be enabled.

Call Types

- Once Call Logging is enabled, a choice needs to be made to log All, Intercom Only, or Outside Only calls.
- Sound File – Enter the path to the .WAV file to be played. Use the Browse button when needed to search for the path to the sound file.

Audible Message Waiting

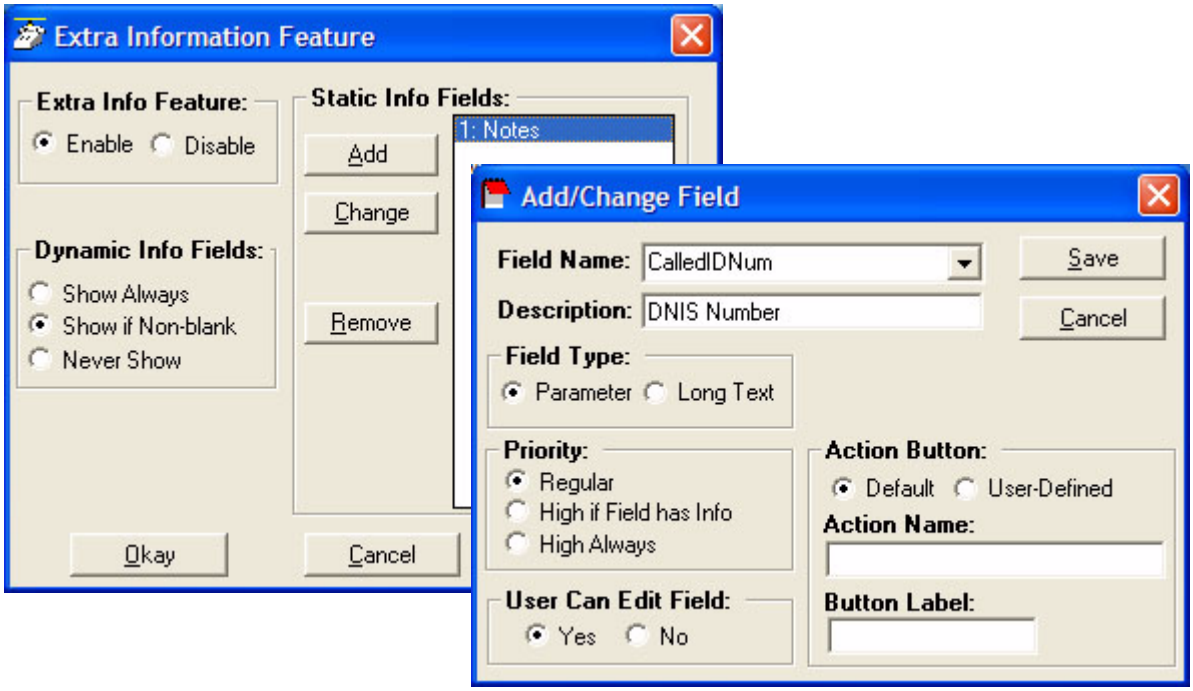
An audible sound can be played when the Message Waiting indication turns on. The sound played can be any .WAV file of your choosing.

- Enable Sound – Placing a check mark in the box enables playing a sound in the file shown. Clicking the Test button will allow you to listen to the sound selected.

Extra Info Screen

Each call may have additional information attached to the call that may be useful. The Configuration button in the window accesses the screen for enabling this feature as well as choosing the extra information items to be displayed along with their properties shown below. With the Extra Info Feature enabled, this symbol appears with each call. When the symbol is gray, no information is present, when cyan, information is attached and when red, high priority information is available.

- Extra Info Feature – Provides for enabling or disabling this feature. When disabled, the Call Information icon will not appear with each call.
- Static Information Fields – These fields will have a fixed area within the Call Notes window for the information to be displayed. You have the ability to Add, Change an existing or Remove any field.



To Add or Change a Static Info Field:

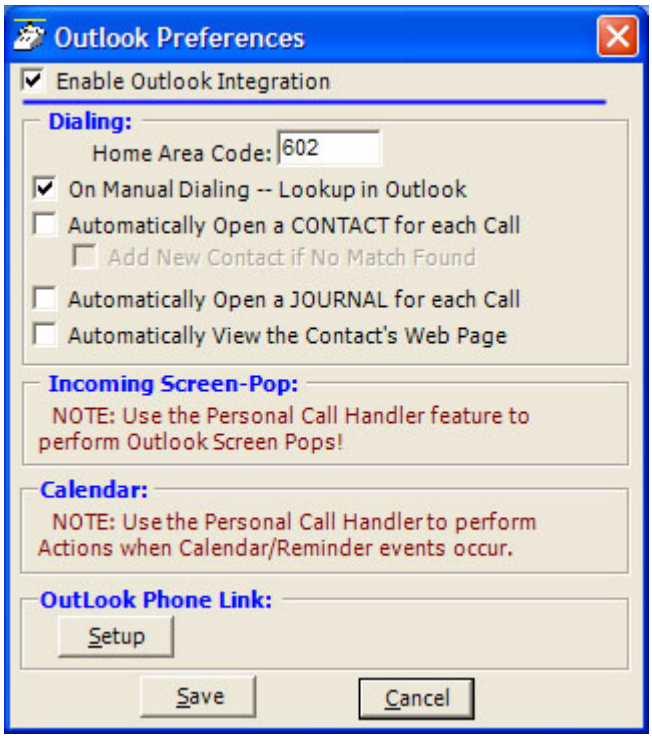
- Field Name – Select from the pre-defined list of fields or create you own field name. This name must match exactly the information field where the information is held.

- Description – Enter any description you desire to mark this field.
- Field Type – Each field can be selected to be either a fixed parameter (1 line) or long text (multiple lines) fields.
- Priority – The field priority selected will mark the color of the icon attached to the call.
- User Can Edit Field – This determines if this field can be changed or fixed.
- Action Button – A button can be defined to use trigger user defined Action. The Action Name must match exactly the name of the Action defined in User Defined Actions.
- Dynamic Info Fields – Allows the choice of when these fields will show. provides a large set of fields, which are automatically filled in based upon the call information. Dynamic fields are fields set by another application and are not pre-defined in.

MS Outlook Integration

Strata Call Manager is specifically designed to work in harmony with Microsoft's Outlook contact management program.

- Initial Setup – Click the Configuration button to reach the Outlook Preferences screen with the following options:

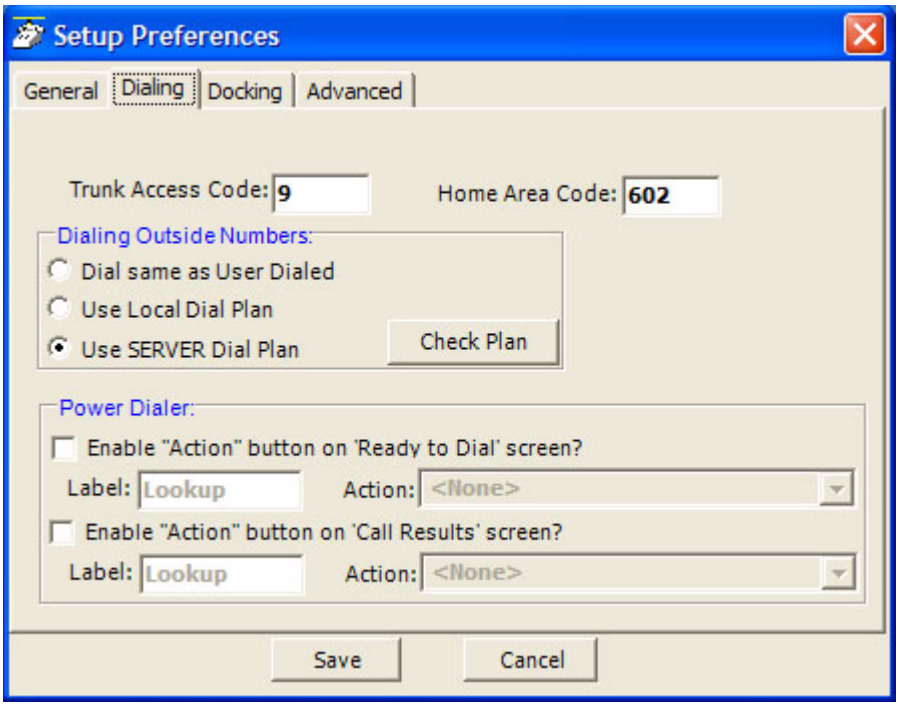

Outlook Preferences
Enable Outlook Integration
Dialing:
Home Area Code: 602
On Manual Dialing -- Lookup in Outlook
Automatically Open a CONTACT for each Call
Add New Contact if No Match Found
Automatically Open a JOURNAL for each Call
Automatically View the Contact's Web Page
Incoming Screen-Pop:
NOTE: Use the Personal Call Handler feature to perform Outlook Screen Pops!
Calendar:
NOTE: Use the Personal Call Handler to perform Actions when Calendar/Reminder events occur.
OutLook Phone Link:
Setup
Save
Cancel

- Enable Outlook Integration – This main option enables/disables the Outlook Integration features. This must be checked for any Outlook features to work. If you're not using Outlook, then this should be disabled.
- Home Area Code – Enter your home area code. This is used for dialing local calls when the area code needs to be stripped from the dialing.

- On Manual Dialing – Lookup In Outlook – When enabled, whenever you dial a phone number manually, the phone number will be looked up in Outlook to see if there is a match. If there is an exact match (only one Contact entry matches) the name and account number from the Contact will be automatically attached to the call. Typically this should always be enabled.
- Automatically Open a CONTACT for each Call – When enabled, whenever you dial a phone number that matches an Outlook Contact, that contact will be popped only – sometimes referred to as “Reverse Screen-Pop”.
- Add New Contact if No Match Found – When enabled, if no contact matches this phone number, a “New” contact in Outlook will automatically pop up.
- Automatically Open a JOURNAL for each Call – Using Outlook Journal entry makes it convenient to keep track of phone calls made (or received) and to takes notes while on a call. By enabling this option a New Journal entry will be popped open whenever you make a call. Also, if the phone number exactly matches an Outlook Contact, then this new Journal entry will be automatically “associated” with that Contact.
- Automatically View the Contact’s Web Page – When enabled, if the contact record contains a Web address for the caller, this web page will pop up within the browser.
- Incoming Screen-Pop – Use the Personal Call Handler feature to perform Outlook Screen Pops!
- Calendar – Enable appointment and reminder events from Outlook Calendar.
- Outlook Phone Link – With the Outlook Link application installed, click the Setup button to access the Setup Configuration for Outlook Link. For details on setting up Outlook Link see the Application Note “Screen Pop Outlook”.

Dialing Tab

Click Preferences > Dialing or Preferences > General > Dialing tab. Use this tab to determine whether to follow a Server-based dial plan, use a dial plan defined for your station, or dial all the codes yourself. The last option is not practical when using a database or using “hot key” dialing since other applications don’t know what is a valid number to dial including entering a trunk access code when needed. If your System Administrator has set up the Server-based Dial Plan, this is the best choice and will save you a lot of time.

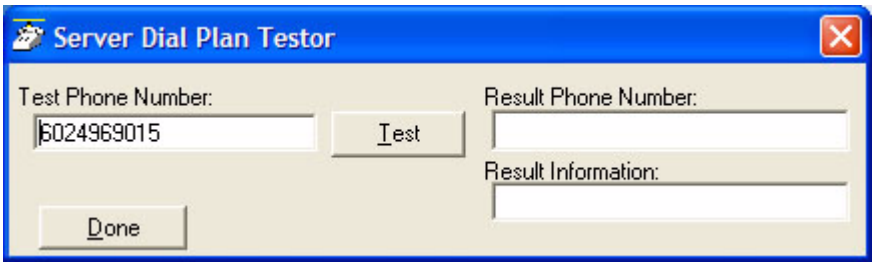


Local Dialing Plan

- Trunk Access Code – This must be set to the access code you need to dial to get an outside line or trunk. Making outside calls using “Speed Dial” keys or dialing from another program, a Trunk Access Code will automatically be dialed to access a trunk before dialing the phone number.
- Home Area Code – Your local area code should be defined here. This is used only when you choose to use the Local Dial Plan.

Dialing Outside Numbers

- Dial same as User Dialed – With this option selected, outside phone numbers will be dialed exactly how the user dialed them (unchanged by Strata Call Manager).
- Use Local Dial Plan – When this option is selected, the user dials an outside phone number, the number will be analyzed according the dial plan and the number will be automatically modified (add “1+” for Long distance, etc) before Strata Call Manager dials it. Use the Change Plan button to view and/or change the settings of the dial plan.
- Use SERVER Dial Plan – When this option is selected, the dial plan that is configured on the NET Server will be used as the dial plan. You can press the Check Plan button to bring up the Server Dial Plan Tester screen that allows you to enter a Test Phone Number and see how it will be dialed. It is the responsibility of the System Administrator to setup and maintain the server dial plan.



Dialer

When the Dialer option is installed, two action buttons can be defined for use with the Dialer. These user-defined buttons can appear on both the Ready to Dial and the Results screens used with the Dialer.

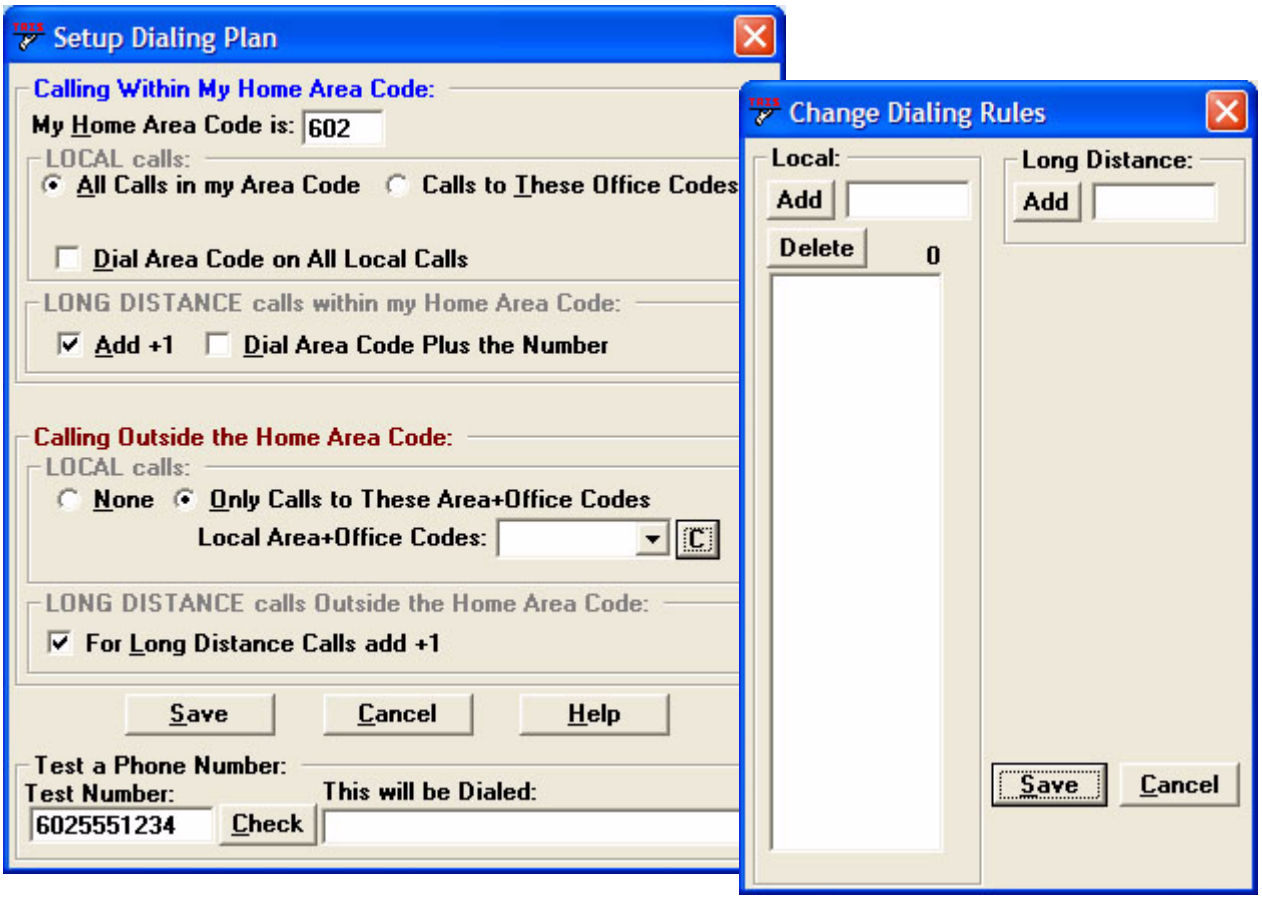
- Ready to Dial – Enable the Action button and select the Action to be performed when the button is pressed. Optionally, the label can be changed to meet your needs.
- Call Results – Enable the Action button and select the Action to be performed when the button is pressed. Optionally, the label can be changed to meet your needs.

Defining a Local Dialing Plan

~~The UK~~ PSTN does not have a uniform structure like the NANP. Area codes can be 2, 3, 4, or 5 digits; subscriber numbers can be 5, 6, 7, or 8 digits; and service codes can be 3, 4, 5, or 6 digits. National numbers can be 10 or 11 digits (including the leading 0).
Note: The leading 0 is not considered part of the area code, although it is commonly written that way. These are the rules for geographic numbers:

1. 2-digit area codes have 8-digit subscriber
2. 3-digit area codes have 7-digit subscribers.
3. 4-digit area codes have 6-digit subscribers.
4. Some 4-digit area codes have both 5 and 6-digit subscriber.
5. 5-digit area codes have 5-digit subscriber.
6. Some 5-digit area codes overlap with 4-digit area codes.

If you chose to use the Local Dialing Plan, you need to create a dialing plan. If you chose SERVER Dial Plan, then you should check with your System Administrator if you have questions.



Calling Within My Home Area Code

- Home Area Code – Set this to the Area code where the phone is located. This will be used by Strata Call Manager to determine which dialed calls are within your home area code and when searching a contact manager (reverse screen-pop) the dialed number will need the area code included, i.e. Microsoft Outlook. This is a duplicate of the entry to the one made in the Dialing Tab, thus the value entered previously will show here.
- All Home Area Code Numbers Local? – Select either All Calls in my Area Code or only Calls to these Office Codes.
- Local Office Codes – This entry is only presented if you chose Call to these Office Codes in the previous step. The pull down listing shows the exchange codes (prefix codes) that are considered to be a local call from your location. Click the C button to display the “Change Dial Rules” screen.
    - To Add Local Prefix Codes – Enter the prefix code and click Add. The wild card character ‘#’ can be entered at the end of a prefix code entry to represent a range of codes. For example, 75# would represent all codes 750 to 759 and 7## would represent codes 700 to 799.
    - To Delete Local Prefix Codes – Highlight a prefix entry and click Delete button. The delete button removes the entire entry from the list, thus if the entry has a wild card, then it removes all codes represented by the wild card character.
    - To Delete a Specific Prefix Code – To delete one prefix code that is part of a range of codes entered using a wild card character, enter the prefix code to be considered not local in the Long Distance box and click Add. For example, if prefix code 755 is long distance but all other 75# codes are local, first enter 75# into the local list and the add 755 as Long Distance – the resulting local list will be 750, 751, 752, 753, 754, 756, 757, 758 and 759.
- Dial Area Code on Local Calls – Enable this feature in areas, such as London , where you must always dial the full 11-digit phone number (include the area code) even when the call is local.
- Add+1 – Check the box if you need to dial a leading 1 before the number for calls within your Home Area Code (applies to US callss)
- Dial Area Code Plus the Number – Check the box when the home area code is also to be dialed.

Calling Outside My Home Area Code

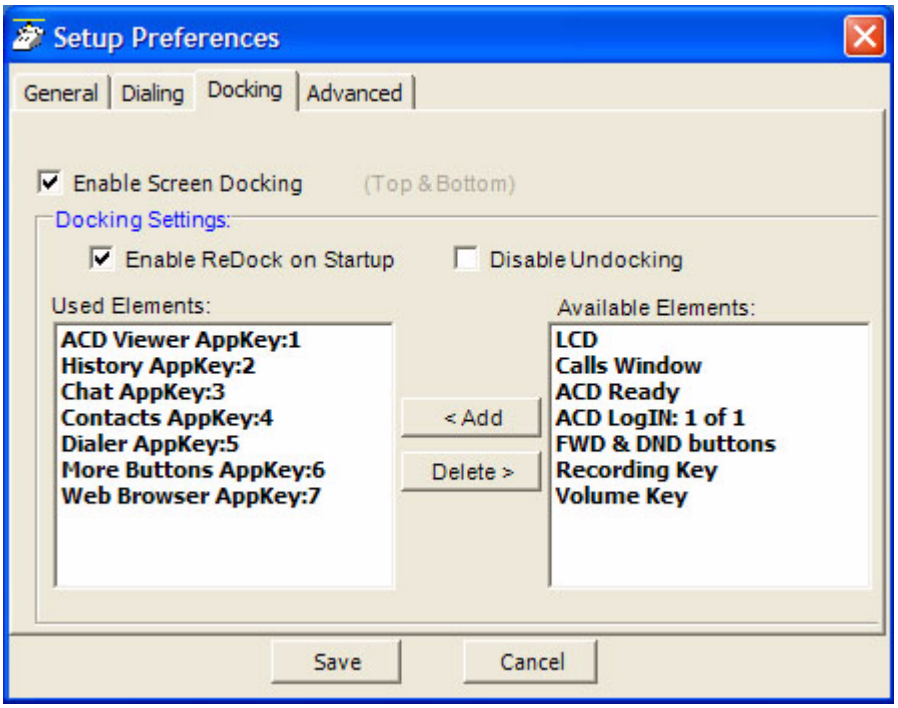
- Any calls outside your Home Area Code LOCAL calls – Select either None or Only Calls to These Area+Office Codes.
- Local Area+Office Codes – This entry is only presented when you chose Only Call to These Area+Office Codes in the previous step. The pull down listing shows the codes (area code plus prefix codes) that are considered to be a local call from your location. Click the C button to display the "Change Dial Rules" screen.
    - To Add Local Area+Prefix Codes – Enter the six digit area+prefix code and click Add. The wild card character '#' can be entered at the end of a prefix code entry to represent a range of codes. For example, 602### would represent all prefix codes in area code 602.
    - To Delete Local Area+Prefix Codes – Highlight a prefix entry and click Delete button. The delete button removes the entire entry from the list, thus if the entry has a wild card, then it removes all codes represented by the wild card.
    - To Delete a Specific Area+Prefix Code – To delete one prefix code that is part of a range of codes entered using a wild card character, enter the prefix code to be considered not local in the Long Distance box and click Add.
- For Long Distance Calls add +1 – Check the box when you need to have a leading one ("1") added when making long distance calls outside your home area code.

Test a Phone Number

Dialing plans can become complex. Use these boxes to enter different telephone numbers and check to see the number that will be dialed. The dialed number should be identical to what you need to dial when using your phone.

Docking Tab

The docking tab defines the contents of Strata Call Manager when docked to the top or bottom of the screen. This includes whether docking is enabled or disabled and a listing of contents by display priority (space limits what can be displayed).



- Enable Screen Docking – When enabled, the Strata Call Manager will automatically ‘dock’ to the top or bottom of the PC screen when it is moved to the top or bottom. When dragged completely to the top, it has a slim dock view.

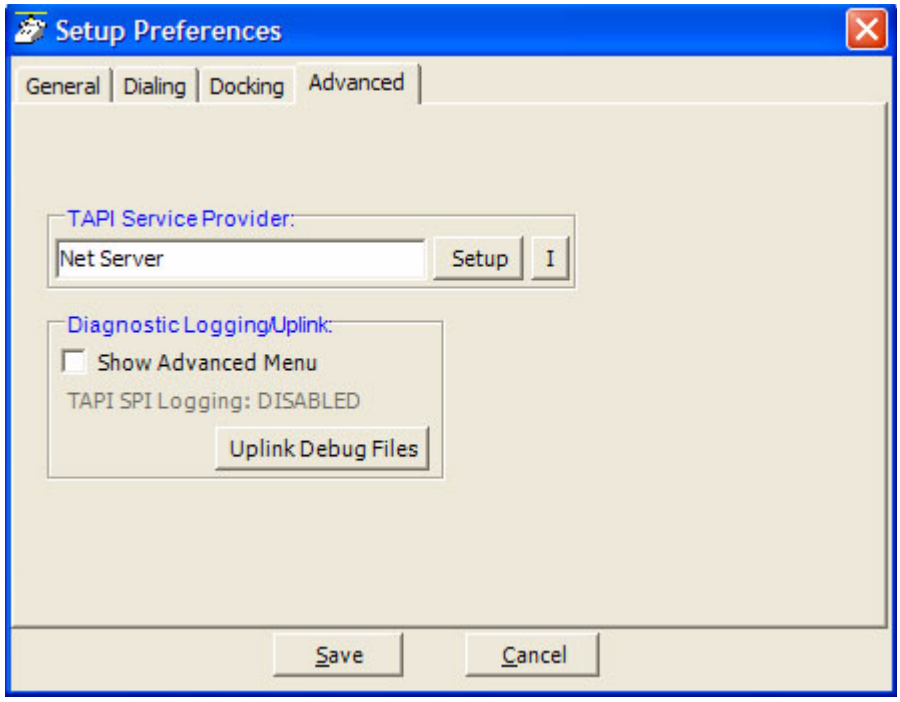
Docking Settings

- Enable ReDock on Startup – Check this box to make Strata Call Manager to startup in the same position and condition as when it was last shut down.
- Used Elements – The displays, buttons, etc. to be used in each profile are configured by moving available elements to the “Used Elements” list. Whenever the Strata Call Manager is screen docked, it will place the elements from the “Used Elements” list on its screen.
- Available Elements – The “Available Elements” list shows the types of elements that are available for use in this profile.

Note: Once you’ve changed the screen-docking settings, the new settings will not be used until the Strata Call Manager is ‘undocked’ (if it’s already screen-docked) and then re-docked.

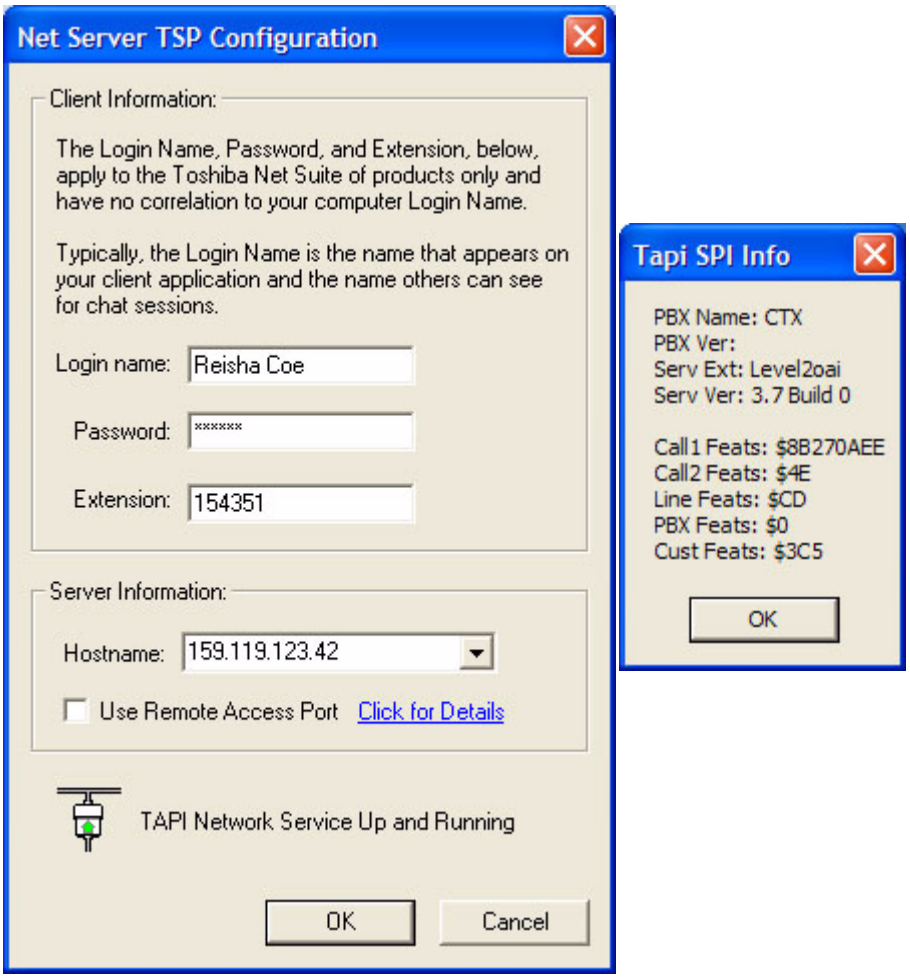
Advanced Tab

Access this screen by clicking Preferences > General > Advanced tab. The basic connection for the Strata Call Manager can be changed using this screen. It also has the capability of sending log files to Technical Support for debugging problems encountered. The TAPI Service Provider should not be changed unless your System Administrator has instructed you to update the settings for finding Net Server for your application.



TAPI Service Provider

- Enter the Service Provider Name – This must be set to access the TAPI service provider to be used – typically, this would be set to: Net Server.
- Setup – Click the Setup button to open a screen to define the TAPI Service Provider as shown on the following page. The I button is a handy status indicator for reading the version levels and license codes for the system and is shown in the Tapi SPI Info screen.


Net Server TSP Configuration
Client Information:
The Login Name, Password, and Extension, below, apply to the Toshiba Net Suite of products only and have no correlation to your computer Login Name.
Typically, the Login Name is the name that appears on your client application and the name others can see for chat sessions.
Login name: Reisha Coe
Password: ******
Extension: 154351
Server Information:
Hostname: 159.119.123.42
Use Remote Access Port
Click for Details
TAPI Network Service Up and Running
OK
Cancel
Tapi SPI Info
PBX Name: CTX
PBX Ver:
Serv Ext: Level2oai
Serv Ver: 3.7 Build 0
Call1 Feats: $8B270AEE
Call2 Feats: $4E
Line Feats: $CD
PBX Feats: $0
Cust Feats: $3C5
OK

- Login name – Enter your Login name. If a new installation, a client will automatically be created in Net Server for this name. Many times the administrator will have defined your client Login name, see your administrator for the name to use.
- Password – Enter an optional password for protecting the connection, when needed.
- Extension – Enter the extension number of the phone this Strata Call Manager is monitoring for call information.
- Hostname – Enter the name of the Server PC where Net Server resides.
- Use Remote Access Port – Check this box only when connecting remotely through the Internet. When connected locally through your LAN, do not check this box.

Diagnostic Logging/ Uplink

Clicking this button enables the Debug utility and have it show on the Main Menu under Settings as well as provide an easy utility for sending all the important information about Strata Call Manager to assist Technical Support to help diagnose any problems when necessary.

- Show Advanced Menu – Place a check in the box to enable the Tool tab Advanced menu option. This needs to be enabled to capture events or show call information when Strata Call Manager is operating.

Note: The statement “TAPI SPI Logging: DISABLED” is the normal indication and is provided to show Tech Support of the status of this device. Tech Support will provide specific instructions for turning on this setting.

- Uplink Debug Files Button – Click this button to access the screen for creating a site name, a contact for the file transfer, and the changing of any options for reporting a problem.
- Site Name – Before using the Uplink Debug Files button, a site name and contact must to be selected. The site name is a unique identifier to make it easier to find the log files for your site and typically, the contact should be assigned “Any Tech Support” to ensure the log files are seen by someone. Use a specific contact name once you are working with an agent and they request you send the “Zip Log Files” to them.
- Description – It is highly recommended to write a description of the problem including all pertinent details such as the conditions and approximate time the incident occurred. These descriptions aid in narrowing down where to look in the log files for the problem encountered.
- Options – Clicking the Options button opens a screen to provide options for how the files are to be sent. The default and recommended option is to “Send Directly to FTP Site”. As an option, when direct Internet access is not available from that PC, the files can be zipped into smaller files, saved on your PC in your Local Settings folder, typically “C:\Documents and Settings\<user name>\Local Settings\Application Data\Toshiba\Strata Call Manager\Zip”. These files can then be e-mailed to.

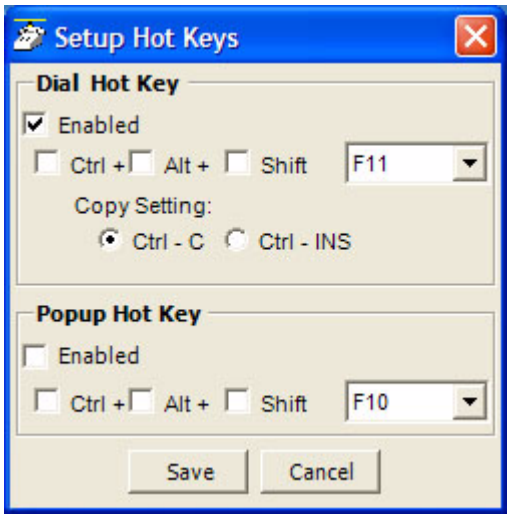
Setting Up Hot Key Dialing & Popup

Strata Call Manager provides two global “Hot Keys” that you can press within any application to send a request to Strata Call Manager. The first key is the Dial Hot Key provides a method for dialing a number from any application. For example, you may have a phone number in a Microsoft Word document that you can highlight in the Word document and press the hot key combination assigned. This dials the number in Strata Call Manager. By default the Hot Key is F11.

The second key is the Popup Hot Key, which will bring Strata Call Manager to the front on the screen. This can be very useful if the Strata Call Manager is minimized or is behind other windows on your screen. Strata Call Manager must be running for this hot key to work.

Setting Shortcut Keys

Click Preferences > Hot Keys displays the Hot Key Dialing & Popup setup dialog box:



- Dial Hot Key – Enable the hot key button and select the key to use including any modifying keys to be used in combination.
- Popup Hot Key – Enable the hot key button and select the key to use including any modifying keys to be used in combination.

Note: Many applications use various “hot keys” or keyboard shortcuts. These keys are defined in advanced settings that your administrator can change if you encounter a conflict with another application. See “Strata Call Manager System Administration Manual” for details.

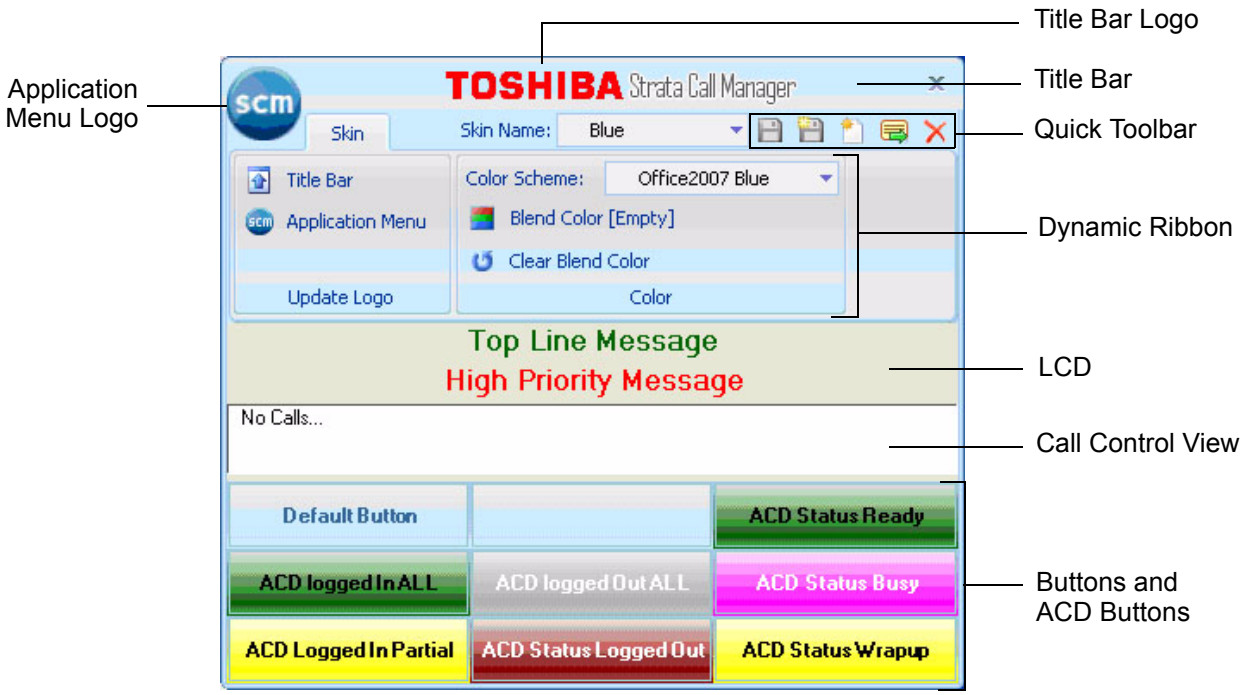
Skin Editor

The entire color scheme as well as the look-and-feel of the SCM can be changed dramatically, by simply selecting a different skin.

Skins can affect the following elements of SCM:

- Screen background colors, texture and appearance.
- LCD colors and fonts
- Calls window color and font.
- Title bar logo and Application menu logo.
- Programmable Button colors and fonts.
- ACD Keys colors.

To access the skins editor, go to Preferences > Skins Editor. The main screen for the Skins Designer (shown below), provides a preview for how the skin will look as it is being designed.



Enter the appropriate information when creating the skins:

- Skin Name – show current skin to be used and being edited. The drop down list will show currently available skin name.
- Color Scheme – set of predetermine color scheme. On some color scheme, users could blend the color secondary color to make a different color.
- Title Bar – change title bar logo to another image file. Supported image formats are PNG, BMP, JPEG, GIF.
- Application Menu – change the application menu logo to another image file. It supports similar file formats as those of Title Bar.

When the design is complete, then you can easily change to this skin by right-clicking the mouse on the logo on the main window and selecting the skin name from the Phone Colors menu.

Skins Files

Each skin design is saved in a file, which is a file starting with "skin_" and ending with ".INI". These files are stored along with other configuration data on your PC in the Local Settings SCM folder\skins. A number of basic skin designs are included with SCM.

Saving/Creating New/Deleting Skins

Icons next to the skin name provide easy access to save, save as, create new, and delete skin functions. Some of these icons can also be accessed using the application menu button. To exit the skin editor, just click the cross icon on the top right corner of the skin editor.

To Create a New Skin

Click the "new" icon, and a "Skin Name" dialog will pop up to allow you to enter the name of the skin. The new skin, initially, will have current existing configuration as you see on the skin editor. You can start changing it.

To Load an Existing Skin

Click on Skin Name drop down list to load an existing skin.

To Save a Skin

Once changes have been made, click the Save icon to save it.

To Save As a Skin

When creating a new Skin, changing an existing skin, or to save a skin using a different name, click the Save As icon. A "Skin Name" dialog will display. Enter the new skin name.

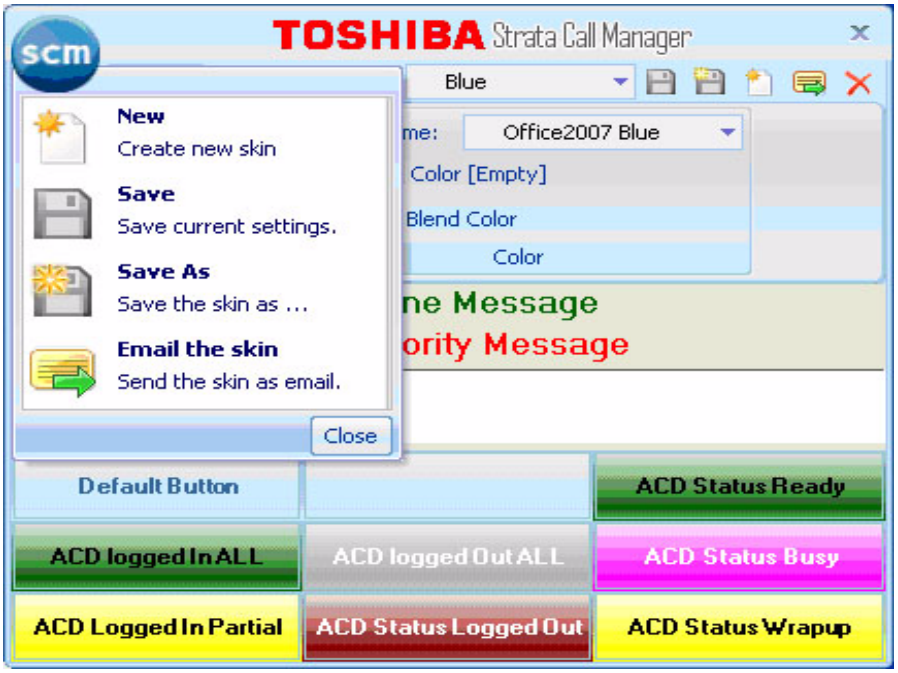
To Delete a Skin

With the Skin loaded to be deleted, click the Delete icon. Click Yes in the dialog box to confirm the action. The system should have at least one skin; deleting the last skin will be rejected.

The Skin Editor

Start by Opening a Skin File or Creating a New File.

The design begins by loading an existing Skin File or starting with a new skin design. See the procedures above.



Set Background Color and General Appearance

Select the color scheme from the drop down menu. On some color schemes, i.e. Office2007 Blue, Office2007 Black, Red Planet, and Office2007 Silver, you have the option to blend secondary colors to make a different color from the standard Office 2007 colors.

- Blend Color – When this option is shown, you can click the option to bring up a color palette dialog box to select the blend color.

Note: The bend option is not available on some color schemes, for example, Red Planet does not have a blend option and it will not display on the menu.

- Clear Blend Color – Click this option to clear selected blend color.

LCD Background and Text Colors

The LCD Display reflects the current status of the phone and offers two lines. The background color and the top and bottom line text can be chosen for your display. Messages that appear on the bottom line can have three different colors depending upon the priority of the text being displayed. The priority is determined by your settings in the Extra Call Information configuration. These settings can be found in Preferences tab > General > Extra Call Information.

Right-click on the LCD area to bring up the menu options:

- Change background color
- Change Top Line Text color
- Change High Priority Text Color
- Change Medium Priority Text Color

- Change Low Priority Text Color
- Change Font
- Reset

Insert your Logo into the Skin

You can choose a graphic different from the default logo that may be used for display in the title line of the SCM display, and application menu logo. The Skin Editor provides a series of default graphics and allows for using .png, .jpg, .gif, or. bmp-formatted graphics as well. The graphic size should not be larger than 22 x 224 pixels to fit within the available space.

- Click the Title Bar option to change Title Bar logo. Browse to select your graphic file in the dialog box.
- Click on Application Menu option to change application menu logo. Browse to select your graphic file in the dialog box.Set the Call Window Colors and Font

Changing Call Windows Appearance

Right click on any call window area, to show menu options:

- Change background color
- Change text color
- Change font
- Reset

Changing the Button/ACD Button Appearance

You can change default button colors and font; and change colors of ACD status buttons.

Default button – By clicking the Default button, you can revert to the default setting of any button when it is initialized or reset. Right click on the default button to show menu options:

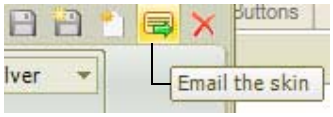
- Change background color
- Change text color
- Change font
- Reset: Clicking the reset button resets the colors and font to the default values for buttons that have not be customized with different colors.

ACD status buttons – Select the ACD status button and right click to bring menu options:

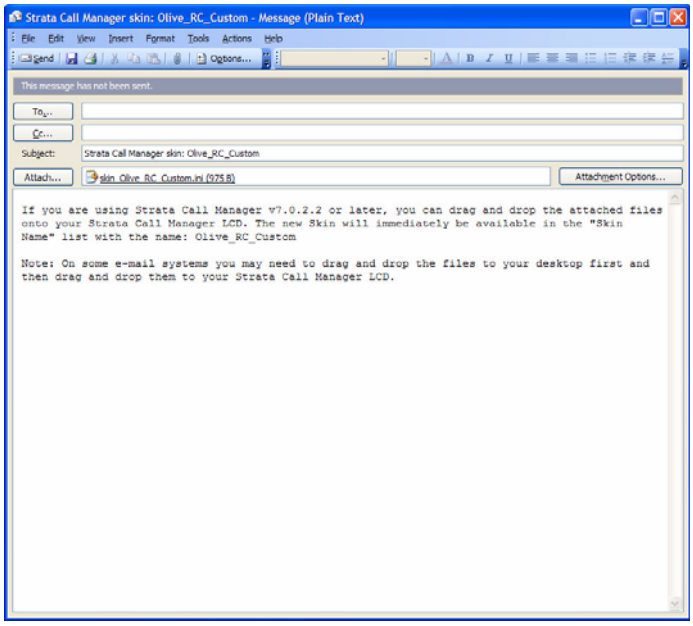
- Change background color
- Change text color
- Reset: Click this button to reset to the default colors for the specific ACD status.
- Click Hide Colors when done.Finish by Saving your Design
- Use the Save or Save As commands to save your design before exiting. See above for details.

Email skins

To send the skin using email, click on the email skin button (shown right). A Microsoft Outlook message dialog box displays (shown below). Enter the appropriate address(s) to send the skin.

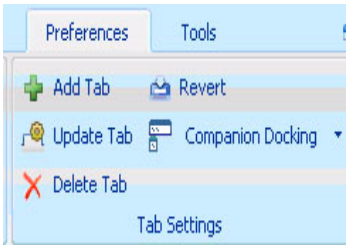


Microsoft Outlook is required when using this function.


Strata Call Manager skin: Olive_RC_Custom - Message (Plain Text)
File Edit View Insert Format Tools Actions Help
Send
Options...
This message has not been sent.
To...
Cc...
Subject:
Strata Call Manager skin: Olive_RC_Custom
Attach...
skin_Olive_RC_Custom.ini (975 B)
Attachment Options...
If you are using Strata Call Manager v7.0.2.2 or later, you can drag and drop the attached files onto your Strata Call Manager LCD. The new Skin will immediately be available in the "Skin Name" list with the name: Olive_RC_Custom
Note: On some e-mail systems you may need to drag and drop the files to your desktop first and then drag and drop them to your Strata Call Manager LCD.

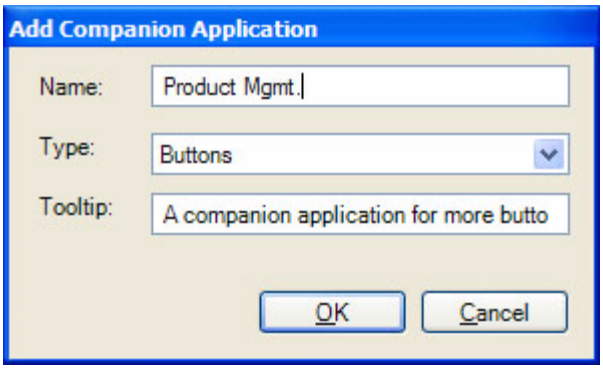
Tab Settings

The options to add, update or delete tabs can be found here. Tab settings is for managing companion applications. The Revert button brings all the companion applications that have been docked outside back to the main window.



Add Tab

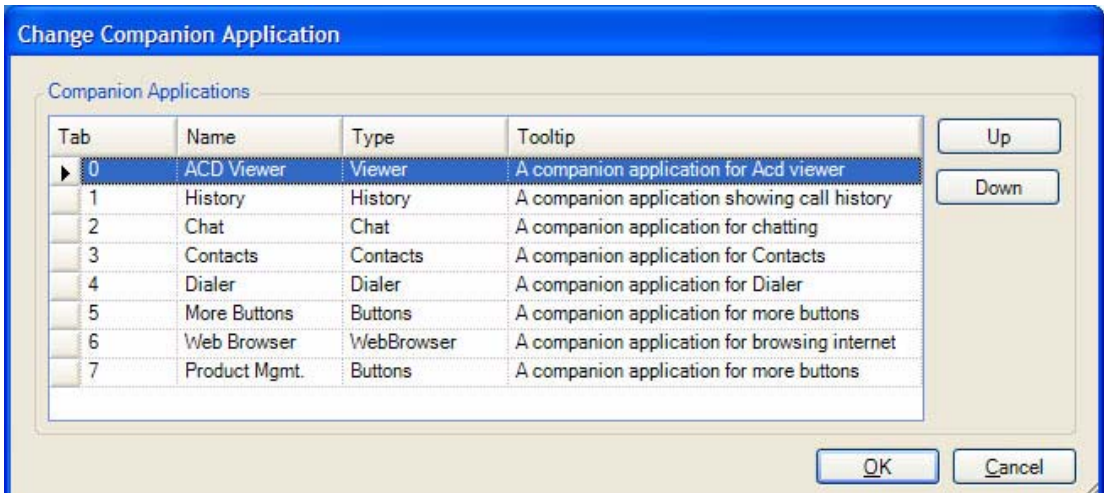
Click the Add Tab button to add a new tab.



- Name – sets the text in the tab.
- Type – The drop down allows the user to select a companion application. A companion application will not appear in the 'Type' drop down if all instances are added to a tab. The More Buttons allows eight instances. All other companion application allow one instance.
- Tooltip – allows the user to set a tooltip for the tab.

Update Tab

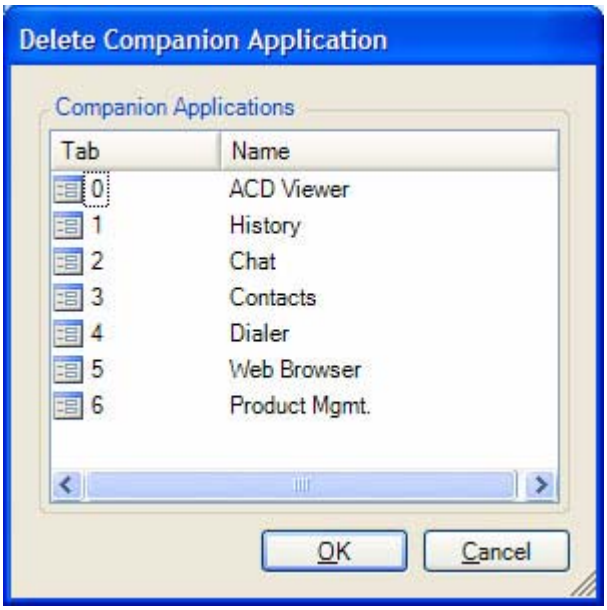
Click the Update Tab button to change the appearance order, name, type, and tooltip of each tab in your tab view. The 'Name' or 'Tooltip' can be changed by clicking in the cell and typing.Use the Up and Down buttons to move the tabs appropriately, then click OK.



Delete Tab Click on the item in the 'Tab' column to toggle deletion (icon has a red 'X' through it to indicate it will be deleted). Hold down the shift or control key to select multiple items. Drag the mouse to select multiple items.

Click the Delete tab button to delete any tab. However, deleting the tab does not delete it permanently, it's more like hiding it from view. All deleted tabs can be re-added with the “Add” button.

Also, not “all information” is lost. For example, deleting the history tab will not clear the history log. Deleting a buttons tab will not re-initialize all the buttons the next time a buttons tab is added. The same is true of the dialer: your planned calls are will still be there when you re-add the application (though they will not fire unless the application is running). The only exceptions is the Browser tab the browsing history may be lost, since deleting a web browser tab and adding a new one always starts on a new blank page.



Revert Click the revert button to bring all the companion applications back to the main window as tabs.

Buttons 4

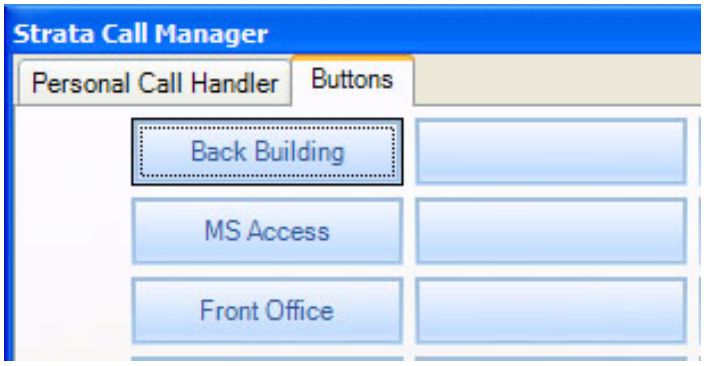
This chapter shows how to use and add, delete or edit button and button banks.

Programmable Buttons

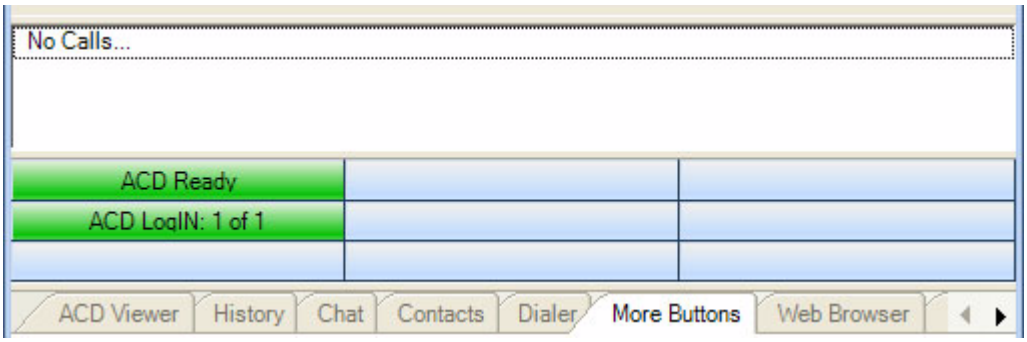
To access Buttons

There are three methods to access buttons:

1. Click on the Personal Call Handler button and then the Buttons tab.

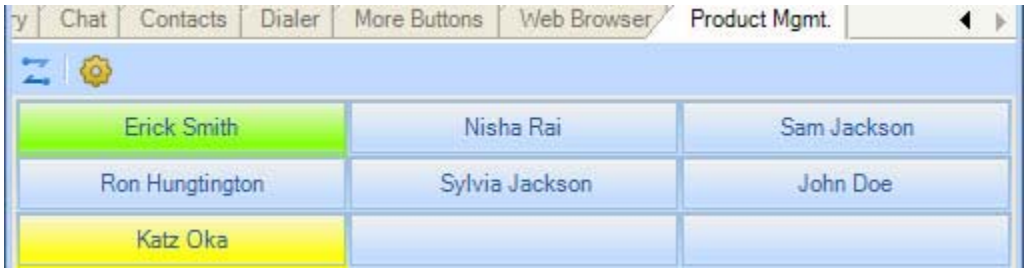


2. There are nine preloaded buttons at the center of the Strata Call Manager screen (shown below).



3. Only the More Buttons companion application tabs have more buttons. These buttons can also be undocked using the dock / undock button on the left. You can create tabs of more buttons. There are 8 banks with a total of up to 64 buttons each. Each Buttons application can be assigned to one of these 8 banks, which means the buttons in that

bank are displayed in the application (No two applications can share the same bank).



User Programmable Keys

The Strata Call Manager has many different User Programmable keys on the main screen, on the Side Window, or on the Extra Button windows. These keys and can be easily configured by the user as “Feature” keys, “Speed Dial” keys, “User Action” keys, “DSS” keys, “Web Access” keys, “Run another Application” keys, or “ACD” keys, etc. This provides the user with one-touch access to features, applications, files, phone numbers, employees, and more. To change any of these keys simply right-click the mouse over the key and select from the menu one of the following options:

To Initialize Key

This resets the key to a blank default state. This makes it much easier to use the drag and drop techniques for setting up keys.

To Swap Keys

To swap the configuration of two programmable keys you can right click on a button, then select the Swap Keys option, then click on another button. Notice that the button has now been swapped. To do this, hold the Control key down while using the left mouse button to drag a key to another location. Or select Swap Keys and then drag & drop key to new location. Keys will swap within the same window and between any other button window.

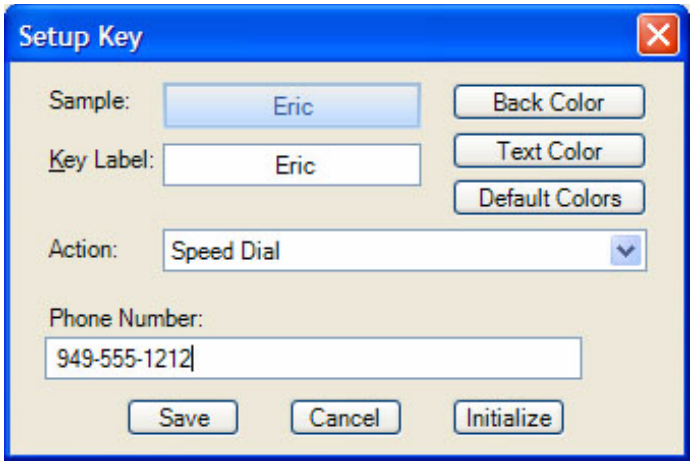
To Copy This Key

To Copy the configuration of one programmable key to another hold the keyboard Control and Shift keys down while using the left mouse button to drag the key to be copied to its target. Or select Copy This Key and then drag & drop to new location. Keys will copy within the same window and between the Side window and the Main Screen. Keys on the Main Screen or the Side window will not copy to keys on the Extra Buttons windows or vice versa.

To Change Key

This opens the Setup Key configuration settings shown below. Several items in the upper portion of this window define the appearance and label of the button. Selecting an Action from the pull down listing will present additional parameters needed to define the choice. Details for each Action follow this procedure.

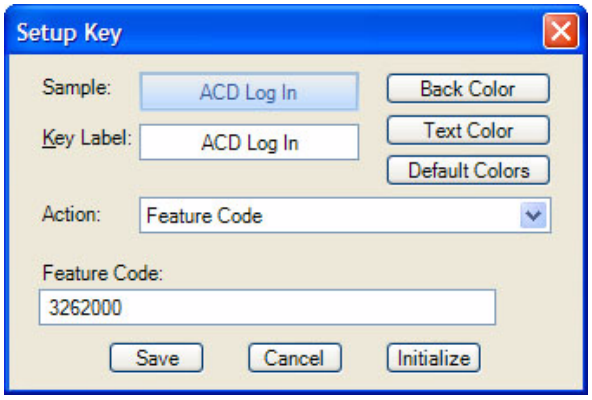
Note: Some users may not have permission to change buttons and keys.



- Sample – Displays the appearance of the following selections.
- Key Label – Type a label for the key.
- Back Color – Choose the color of the key.
- Text Color – Choose the text color to use for the key label.
- Default Colors – Pressing this button will reset the colors of the key and text to the default for the skin used.
- Action – Choose an action to be performed. This selection will open additional settings corresponding to that action. See the settings below for the different possible actions.

Feature Code Keys

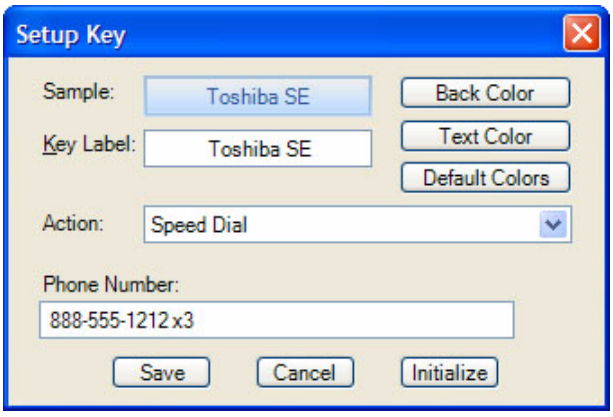
Provides one-button access to a Feature Code on the system. You can include additional digits when appropriate. The system used will determine access to the Feature Codes available. For example, to log into ACD Group x2000, you could set the Parameter to “326 2000” to work as a Log In key.



Speed Dial Keys

Creates a speed dial key for one-button dialing. Strata Call Manager automatically inserts the Trunk Access Code when a Dial Plan has been specified, making it unnecessary to enter this code in the speed dial number. Speed Dial numbers can be any number 0~9 and * and # digits. You can include commas to insert a 2-second pause in the dial string, i.e., setting up a key to call V-mail (x2502) and logon to a mailbox (1000 with password 12345) then enter “2502, *1000,12345”.

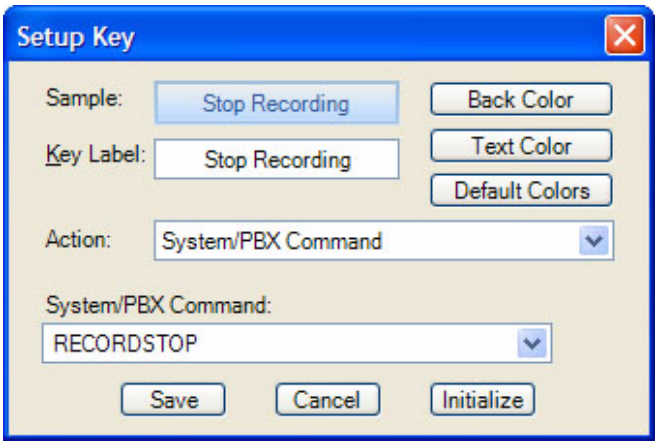
You can also include an “X” character in a phone number string to have the dialing stop at that point and queue up the rest of the number in the dial buffer. The user can listen to the call and click the Dial button to dial the rest of the digits at the appropriate time. Examples include: (1) dialing a person who has an extension number (i.e. “4969040 x1008”), (2) dialing a pager and you want to display a number on the LCD of the pager (i.e. “5551234x4969040#”), or (3) dialing a long distance access code (i.e. “8884083279 x17135551234”). Note: You can use more than one “X” in the phone number and it will wait after each “X” (i.e. “4969040 x8 x*1009,1234”).



System/PBX Command Keys

The System/PBX command keys are maintained for backward compatibility. It is highly recommended that the user create User Defined Actions for System/PBX Commands. The User Defined Actions have expanded the options available for a number of these commands and thus offer better choices.

The description below shows the possible features that appear in the Setup Key window. Some of the features listed are dependant upon Strata Call Manager System Administration settings such as the Auto Call Record/Tracer Recording features, which only appear when the System Administrator enables those items. Others are dependant upon the PBX used by Strata Call Manager.



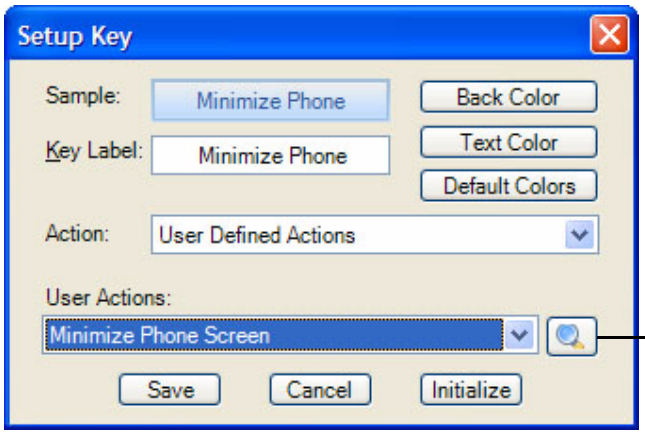
The commands that may be available will depend upon the PBX you are using. Commands that may be available include:

PBX Call Control	Auto Call Record/Tracer Recording
Answer – Current call.	Start Record
Conference – Simulates pushing Conf key.	Stop Record
Dial xxxxxx – xxxx= the number to dial.	Set Bookmark “Msg”
Hangup – Hangup current call.	Call Center
Hold – Hold current call.	ACD – Agent Help
* Modify Call “Field” “Value	ACD – Call Pickup
* Transfer	Set Work Units “Value”

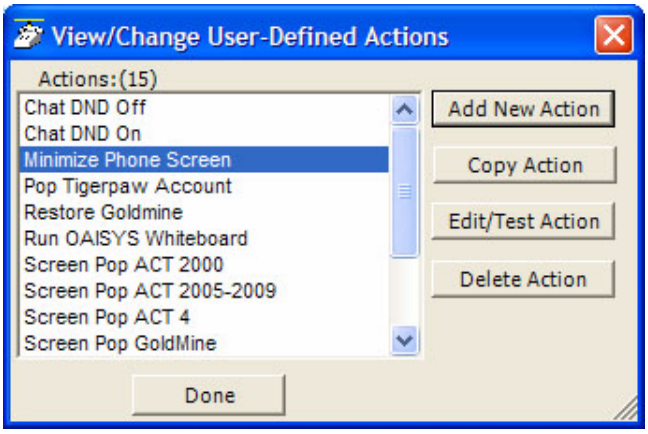
* An enhanced feature is available in User Defined Actions

User Defined Action Keys

Customized features can be placed on keys by using User Defined Actions. Actions that have been defined will be available in the pull down list.



To create a new action, go to the User Actions section, click the View/Change action button on right (shown above). The following screen displays.



Select the appropriate action or button to add, copy, edit, test, or delete action. The appropriate action screen displays. Click Save and then click Done.

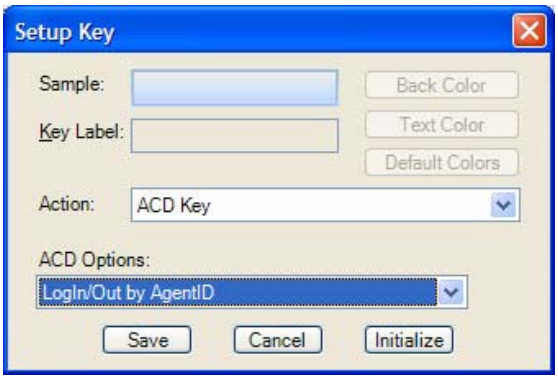
Refer to Chapter 5 – Actions for more information on editing actions.

ACD Keys

ACD keys can be set on any button, including Buttons companion applications and the side view buttons.

Depending on the configuration of your call center, these keys can be used to: (1) Login or Logout of ACD groups (via Agent ID and phone Extension) and/or (2) to Show/Set your Agent status. Other ACD functions may be available in the User-Defined Actions depending upon the PBX used with Strata Call Manager.

Note: The color of ACD Keys cannot be changed as the colors are determined by the ACD State for the key.



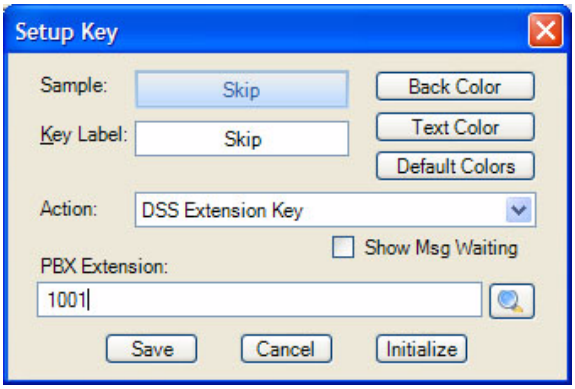
DSS Extension Keys

Direct Station Selection provides one-button dialing to a specific station. DSS Keys also provide a visual status indicator of the station: Ringing, Busy, Idle, or Do-Not-Disturb.

To create DSS keys

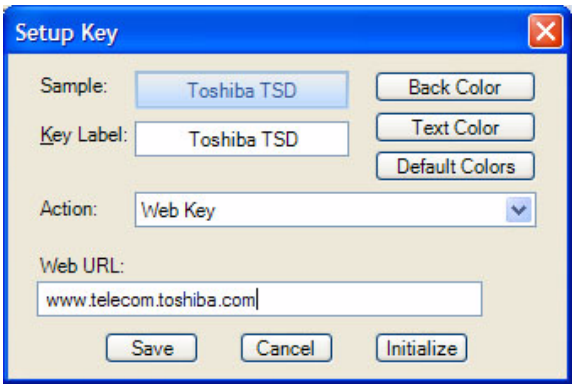
1. Set action to DSS extension key.
2. Click the magnifying glass.
3. Select the contact from your directory, as it is shown in the little popup on the side. This will set the label for you.

You can then change the colors and edit the name for easy identification.



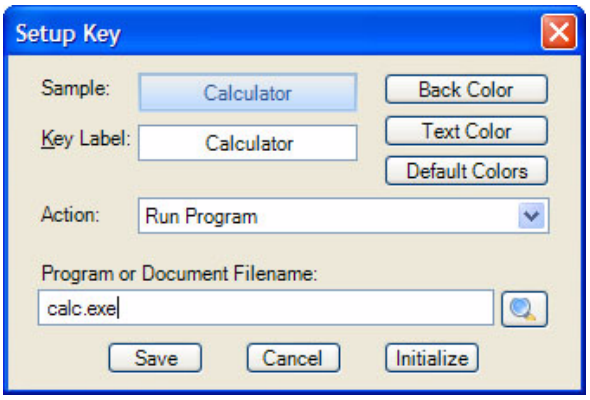
Web Keys

Web keys allow you to program an Internet (or intranet) URL into the key. Press the key to open the default web browser to the specified web page.



Run Program Keys

This sets the key to run a specific application or load a specific document. For example you could create a “Calculator” key to run the windows calculator by setting the “Program filename” to CALC.EXE. Alternatively you could create a key to show your “projects” Excel spreadsheet by simply setting the “Program or Document Filename” to: PROJECTS.XLS.



Creating Keys using Drag & Drop

Program unused keys by simply dragging phone numbers or feature codes from other programs. Some examples include:

- Drag a Contact from Microsoft Outlook to a key to create a Speed Dial button
- Drag a call from the Call History to create a Speed Dial button
- Drag an entry from the Contacts application to create a Speed Dial button

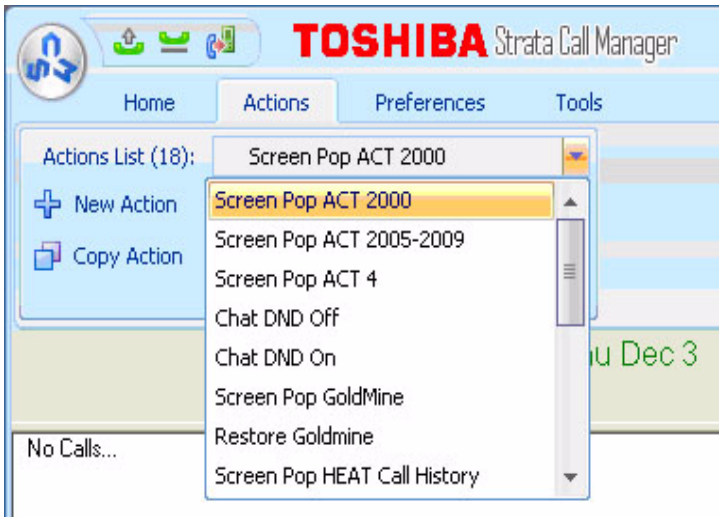
Actions 5

You can define powerful actions that can be used with both the Personal Call Handler and under the Programmable Keys. These actions can be as simple as playing a .WAV file to as powerful as sending a specific DDE message to another programs to “Screen Pop” a database. When defining a new action, it's usually a good idea to test the action to make sure it works correctly. The screens for creating actions also provide a testing facility to make this testing easy.

Note: Depending on your configuration you may not be able to change the User-Defined Actions, in which case you should check with your System Administrator.

Creating Actions

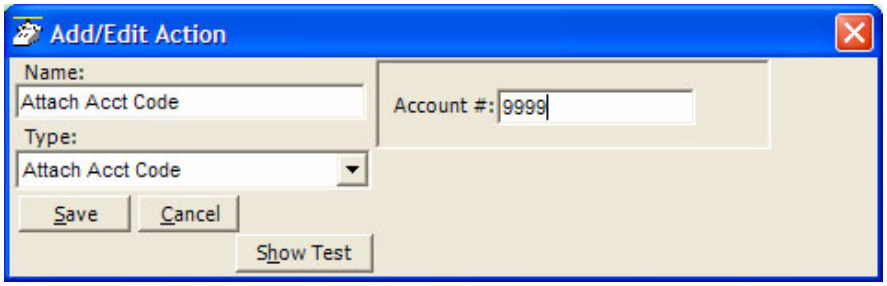
The Creating of Actions can be done by going to the Actions tab.



Under the Actions List, the drop down shows a listing of currently defined actions and options that you can Add, Copy, Edit/Test or Delete. Pressing the Add, Copy, or Edit/Test buttons takes you to a screen for creating or editing an action. The types of actions that can be created are defined below. When actions are copied, created, or edited, those changes are stored in the compiled actions file (NET_PHN.acs). If this file is lost for some reason and Strata Call Manager is restarted, all actions will revert to the individual actions stored in the User’s Local Settings Strata Call Manager folder. Thus, it is wise to save new actions by exporting the action for backup (see ““Exporting Actions” on page 69 and “Importing Actions” on page 69).

Attach Account Code

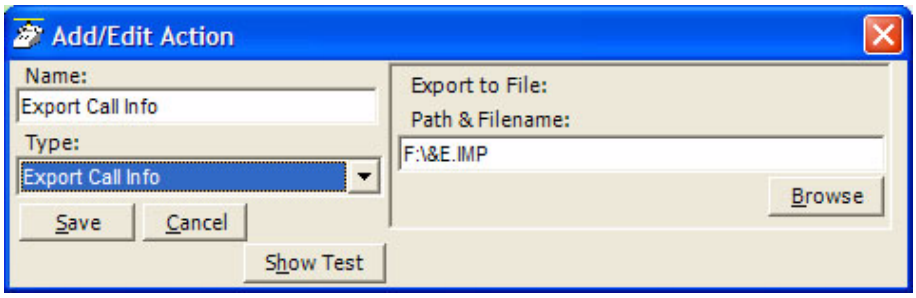
This action attaches an account code to the active call. This account code is passed to other applications such as Insight or TASKE Contact.



* Account # – Enter an accounting number to be associated with this call.

Export Call Info

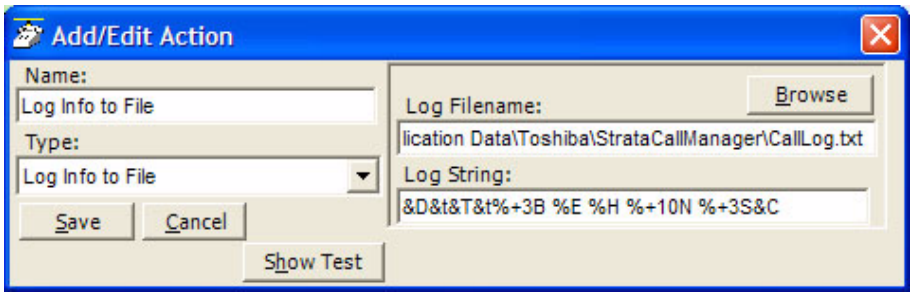
This action is used to export call information to another program (like the CTI Call Handler) in order to keep its Call Info Database current. When this action is triggered it will Popup an “Export Call Info” screen allowing the user to fill in any missing call information (typically the 'Main Listed Phone #') before they press SAVE to export the information to the centralized database.



- Path & Filename – Enter the complete path name for writing the exported file or browse to find the path.

Log Info to File

This action writes a string of information to a text file. This can be used to make a call log, like personal SMDR, and/or to trigger actions in other programs. A wide range of call and system variables (see “Action Variables” on page 66) may be used to create the information to be written into the file.



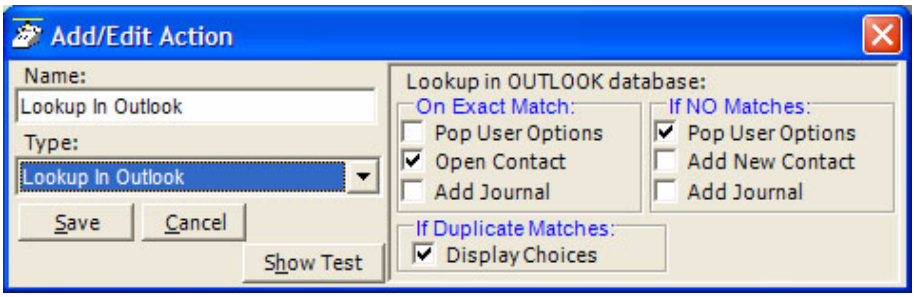
- Log Filename – Enter the complete path name of the file to log the information. Use the Browse button to find the file name, when needed.
- Log String – Create the string defining the content to be written into the file. The above example created the following entries into the file “CallsLog.txt”.

Note: The number of characters sent for the name variable was limited to the first 10 characters (%+10N), which truncated the names in the file to the first 10 characters. See “Action Variables” on page 66 for details.

12/02/04	16:27	In 1027 480-496-9040 Joe Blow I No
12/02/04	16:28	In 1027 480-629-8723 Joyce Gree Yes
12/02/04	16:28	In 1027 949-853-3351 Katz Yamag Yes

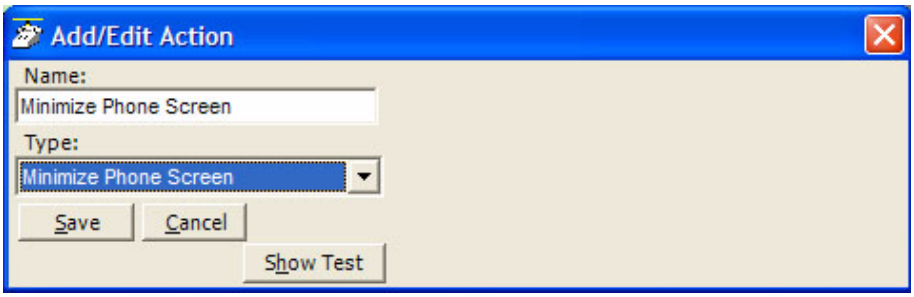
Lookup in Outlook

This action will lookup the phone number in Microsoft Outlook and then selectively opens a contact, creates a new contact, or adds a journal entry.



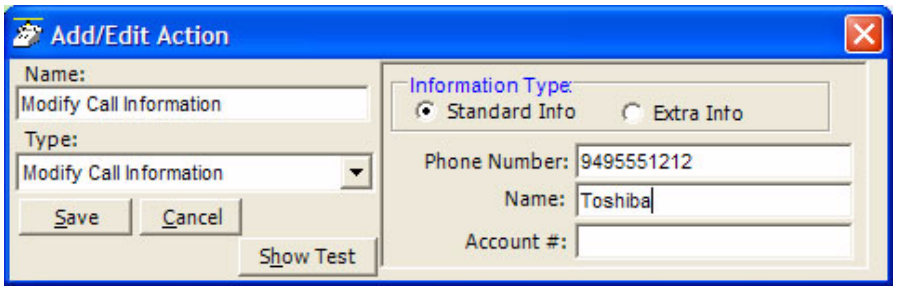
Minimize Phone Screen

This action shrinks the Strata Call Manager screen to an Icon in the Tool Tray. To return Strata Call Manager to its original position requires the user to either double-click the icon in the tray or right-click and select Show.



Modify Call Information

This action changes the Caller ID name, Caller ID name, or Account code of the active call on this phone and when the PBX supports the changes, the same information held in the PBX. Using the Extra Info option provides for entering or changing any other information associated with the call.

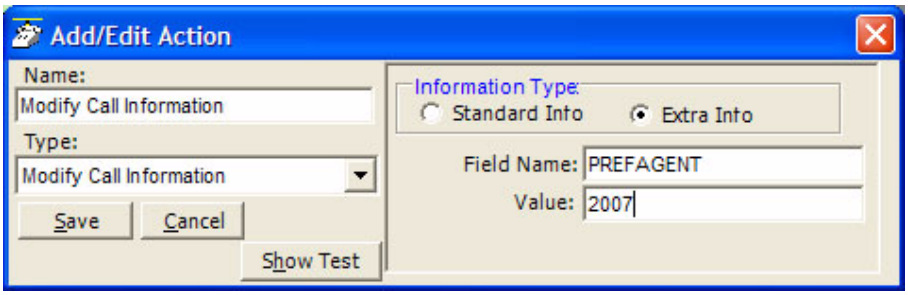


- Information Type – Select either Standard Info or Extra Info. The Standard Info option supports updating the information in the Strata CIX system when supported by the Strata CIX. The Extra Info option can enter or change any field for this call.

Standard Info

- Phone Number – Enter a phone number to be used as the Caller ID number for this call. This replaces an existing number or adds a number, if blank.
- Name – Enter a name for the caller to be used as the Caller ID name. This replaces an existing name or adds a name, if blank.
- Account # – Enter an account code for the call. This replaces an existing number or adds a number, if blank.

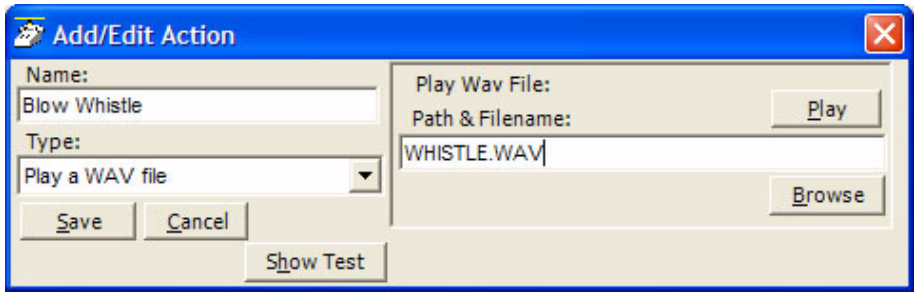
Extra Info



- Field Name – Enter the name of the field to be changed. This name must match exactly the field name including uppercase and lowercase syntax. For example, a user may want to create User Programmable Keys identifying the “Preferred Agent” for the call prior to transferring the call into a queue. The Field Name would be entered as PREFAGENT. The value would be the agent’s ID code.
- Value – Enter the value to be used for this field. Following the above example, then the agent’s ID code would be entered into this field.

Play WAV File

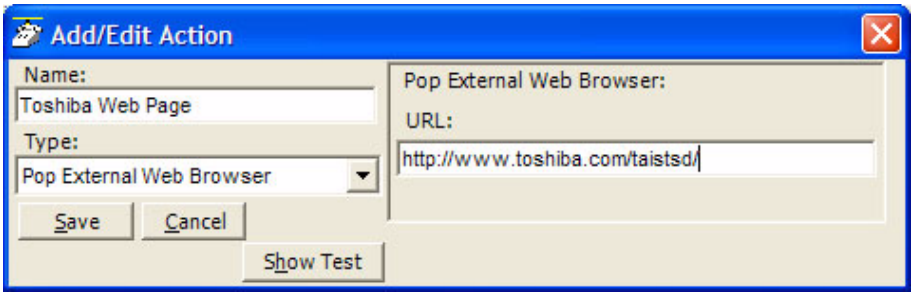
This action will play a specified WAV file on the PC sound card.



- Path & Filename – Enter the complete path name for the WAV file to be played or browse to find the path of the file.

Pop External Web Browser

This action sends a URL to the PC’s default web browser (run the web browser if it isn't already running). Works with Netscape Navigator and Microsoft Internet Explorer.



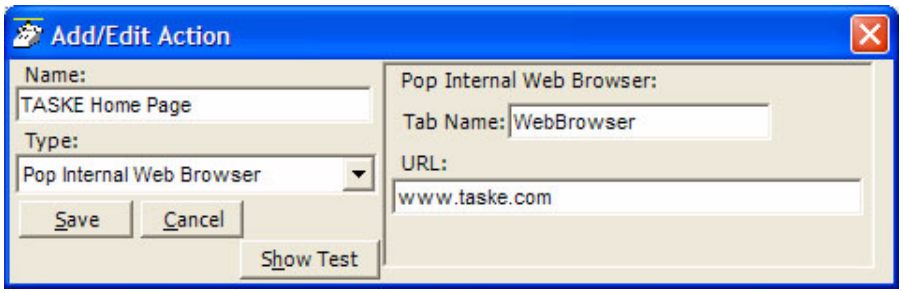
URL – Enter the complete URL name for the Web site to be opened in your browser. The URL can contain Action Variables to make the lookup use call information.

Pop Internal Web Browser

This action can be used to send a URL to the 'built-in' web browser of the Strata Call Manager (when installed) or can be used to create access to other companion application programs.

An example of using your Personal Call Handler to automatically open the Integrated Web Window, whenever an outside call rings in, to provide a script to for answering that call. The URL can contain action variables for example using the DID/DNIS number used for the call to open a page created for each DID/DNIS number. Thus when the call arrives, a screen opens for a script or questions to use for that call.

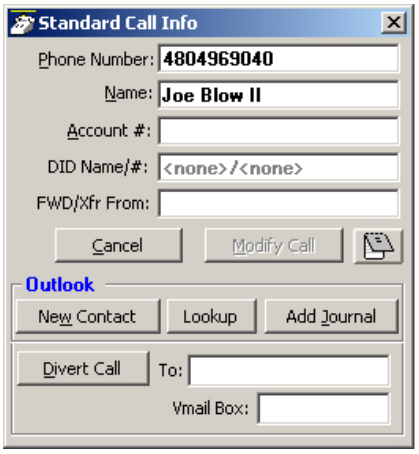
Another use may be to have several "Personal Directories" where the 8 button limit may not allow access to more directories. Assigning a programmable button can allow opening these personal directories using one-click access.



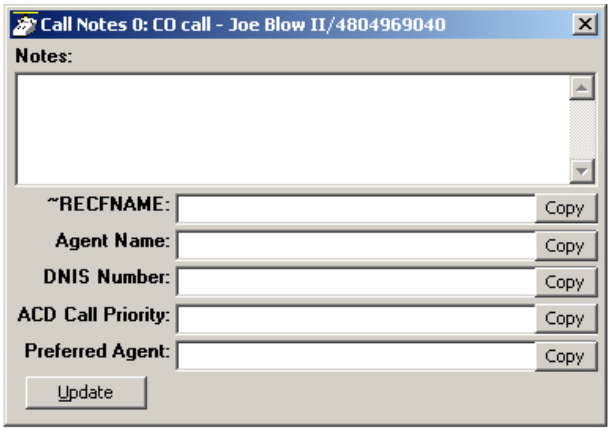
- Tab Name – Enter the name of an existing Web Browser Companion Application (tab name). This name must exactly match the name as displayed. This action uses the specified tab as the parent window.
- URL (Param1) – Enter a URL or other Param1 parameters as indicated in the table below. The URL can contain Action Variables as part of the entry.

Popup Call Info Screen

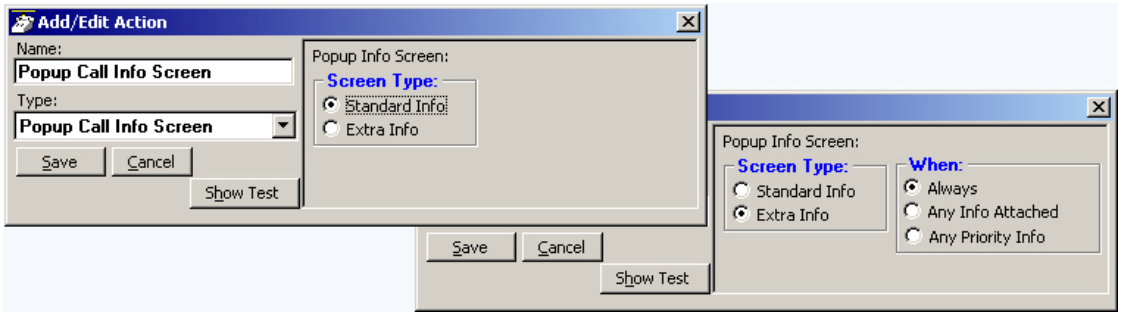
This action will pop open either the Standard Call Info screen or Extra Call Info screen. The Standard Call Info screen allows the user to type in the Caller ID name or number or Account code of a call, lookup the phone number in Outlook and/or Open a Contact or Journal, or Divert a Ringing call to another location. Either screen allows you to view, change, or attach additional extra information to a call. The fields shown in this window are defined in Preferences, General Tab (see "Extra Info Screen" on page 23).



Standard Call Information window



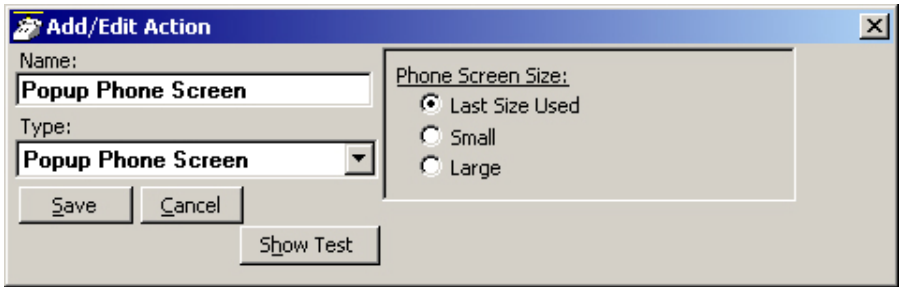
Extra Call Information window



- Popup Info Screen Type – Choose either Standard Info or Extra Info. When Extra Info is selected, choose when the popup will occur: Always, Any Info Attached, or Any Priority Info.

Popup Phone Screen

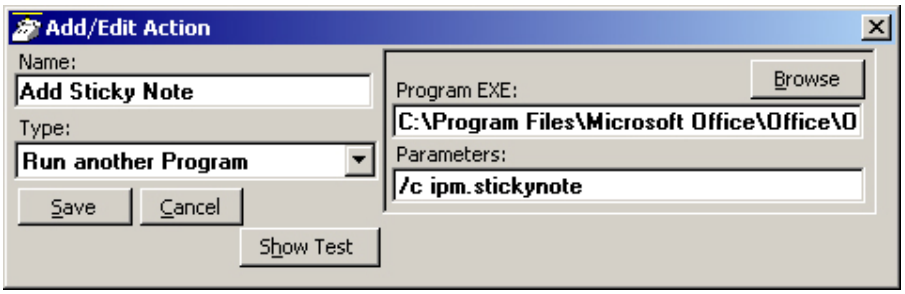
This action causes a popup (Restore) of the Strata Call Manager screen from an icon.



- Phone Screen Size – Select the size for Strata Call Manager's main screen. The choices are to restore to the Last Size Used, Small (or compact view), or Large (or expanded view). When Strata Call Manager is docked to the top or bottom, Strata Call Manager restores to settings defined in the Preferences Docking tab.

Run another Program

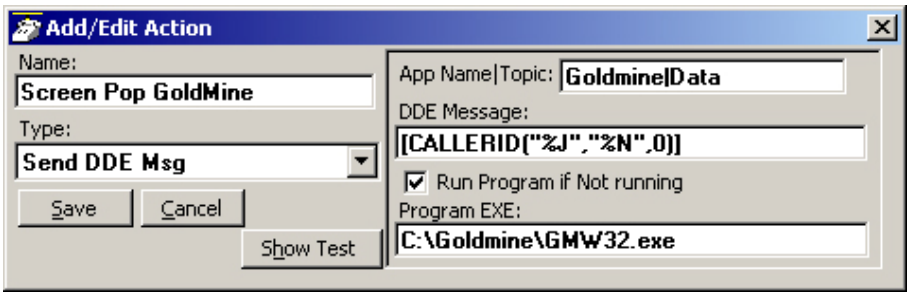
This action triggers the running of another program on the PC.



- Program EXE – Enter the name and path of the program to be run. In the example above, the program is Outlook.exe. Use the Browse button to find the file as needed.
- Parameters – Enter any additional parameters that may be accepted as part of the command line to startup the program. The example above uses Outlook to pop open a "sticky note" with data and time recorded.

Send DDE Msg

This action sends a DDE Execute message to another program on the PC. Frequently this is used to “Screen Pop” a contact management program, such as Goldmine.



- App Name Topic – The application will specify both the application name and topic name used for making the communication link. Follow the application note or that application’s documentation for specifics.

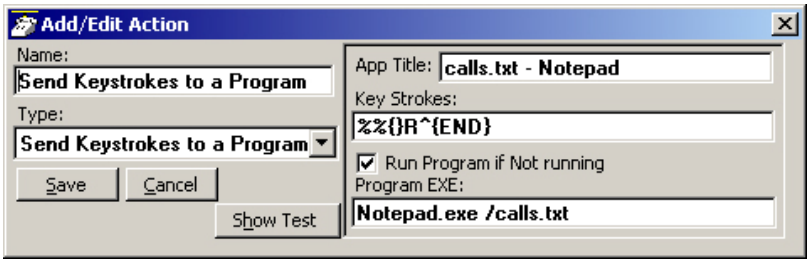
Note: The pipe character ‘|’ must separate the application name and topic name.

- DDE Message – Follow the application note or the application’s documentation to define the message to be sent for that application. The format and syntax is defined by that application.
- Run Program and Program EXE – If the target program is NOT found to be running, you can have the action attempt to automatically start the program.

Send Keystrokes to a Program

This action provides a way to send keystrokes to another Windows program just as if the user typed them into that program. This can be used, for example, to pop up another program whenever a call rings in.

Note: Use this action carefully because when the action is triggered, the keystrokes will be sent to the target program regardless of the state of that program (i.e. even when the user is in the middle of some action in that program).



- App Title – must exactly match the text in the title bar of the target program (not case sensitive).
- Key Strokes – You can send any keys including special keys (see below). One or more characters represent each keystroke. To specify a single keyboard character, use the character itself. For example, to represent the letter A, use “A” for key text. If you want to represent more than one character, append each additional character to the one preceding it. To represent the letters A, B, and C, use “ABC” for key text.
- Run Program if Not Running – If the target program is NOT found running, you can have the action attempt to automatically start the program.
- Program EXE – Enter the path to the program to be run and a command-line parameter when needed to the target program for startup. Use a forward slash after the EXE name and before the command line parameter(s).

Example Action:

The example in the diagram sends keystrokes to the Notepad program to Popup (restore) the program and to move the cursor to the end of the file.

1. App Title: The App Title must match exactly what appears in the title bar of Notepad: calls.txt - Notepad
2. Key Strokes: To restore Notepad (Alt Sp R): Key Strokes:= %%{ }R and to move to the end of the file (Control+End): append to Key Strokes: ^{END}
3. In Program EXE: Enter program name and file name to open “Notepad.exe /calls.txt”.

Note: The forward slash after “Notepad.exe” is needed to allow the command-line parameter “/calls.txt” to be used. The result is that the file “calls.txt” will open, if not open, and popup with the cursor at the end of the file allowing additional entries to be made.

Special Keys

The plus sign (+), caret (^), percent sign (%), tilde (~), and parentheses ( ) have special meanings. To specify one of these characters, enclose it inside braces. For example, to specify the plus sign, use {+}. Brackets ([ ]) also must enclose them in braces. To send brace characters, use {{} and {}}.

To specify characters that aren't displayed when you press a key (such as Enter or Tab) and keys that represent actions rather than characters, use the codes shown below:

Key	Code	Key	Code
Backspace	{BS} or {BKSP}	Tab	{TAB}
Break	{BREAK}	Up Arrow	{UP}
Caps Lock	{CAPSLOCK}	F1	{F1}
Clear	{CLEAR}	F2	{F2}
Del	{DEL}	F3	{F3}
Down Arrow	{DOWN}	F4	{F4}
End	{END}	F5	{F5}
Enter	{ENTER}	F6	{F6}
Esc	{ESC}	F7	{F7}
Help	{HELP}	F8	{F8}
Home	{HOME}	F9	{F9}
Ins	{INS}	F10	{F10}
Left Arrow	{LEFT}	F11	{F11}
Num Lock	{NUMLOCK}	F12	{F12}
Page Down	{PGDN}	F13	{F13}
Page Up	{PGUP}	F14	{F14}
Right Arrow	{RIGHT}	F15	{F15}
Scroll Lock	{SCROLLLOCK}	F16	{F16}
Spacebar	{ }	Control	^
Shift	+	Alt	%%

Combination Keys

To specify keys combined with any combination of Shift, Control, and Alt keys, precede the regular key code with Shift, Control, or Alt code.

To specify that Shift, Ctrl, and/or Alt should be held down while several other keys are pressed, enclose the code in parentheses. For example, to have the Shift key held down while E and C are pressed, use “+(EC)”. The code “+EC” will send the characters Ec instead of EC and “E+C” will send the characters eC.

To specify repeating keys, use the form {key number}; you must put a space between key and number. For example, {LEFT 42} means press the Left Arrow key 42 times; {h 10} means press h 10 times.

Note: Keystrokes cannot be sent to an application that is not designed to run in Microsoft Windows (MS-DOS programs, even in a DOS window) nor can the Print Screen (PRTSC) key be sent to any application.

Set Phone Do Not Disturb

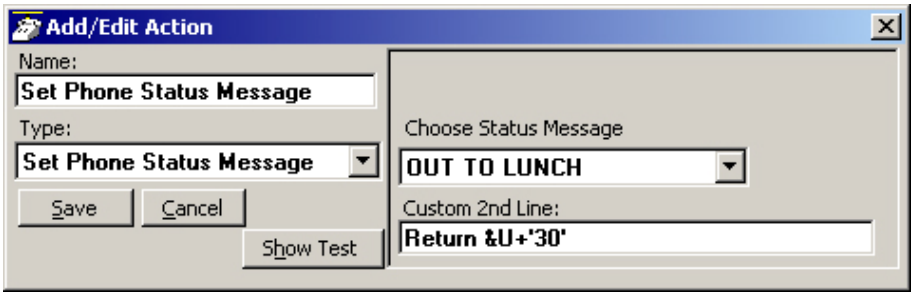
This action sets the phone’s Do Not Disturb feature in the telephone system (requires the system to support this feature via OAI link) and sets a reason for this status. This reason message displays on the phone’s display as well as appearing on Strata Call Manager and the DSS keys of other users of Strata Call Manager.

- DND Message – The normal is to use the message defined below, but can be created to provide the same message as provided on the phone.
- Set DND On – Choose the device for which this action is to apply, the primary phone or the secondary phone.
- Choose DND Message – Select from the available messages in the drop down list for the message that appears in the upper line of the phone’s display.
- Custom 2nd Line – Optionally enter a second line to display on the lower line of the phone’s display message.

Note: Action Variables may be used including the time variable plus ‘x’ minutes to set a current time plus 60 minutes in the example above.

Set Phone Status Message

This action works much the same as Set Phone Do Not Disturb except it does not change the phone's DND status and the message only appears within Strata Call Manager and the DSS keys on other users of Strata Call Manager.

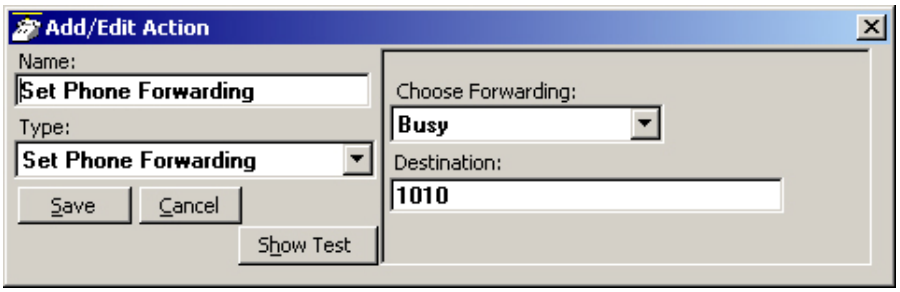


- Choose DND Message – Select from the available messages in the drop down list for the message that appears in the upper line of the phone's display.
- Custom 2nd Line – Optionally enter a second line to display on the lower line of the phone's display message.

Note: Action Variables may be used including the time variable plus 'x' minutes to set a current time plus 60 minutes in the example above.

Set Phone Forwarding

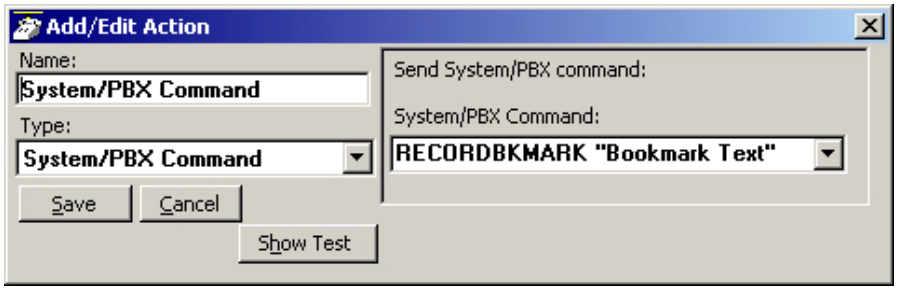
This action changes the Call Forwarding setting of the phone in the PBX for the prime DN of the phone. The action can determine the type of forwarding (Immediate, Busy, No Answer, Busy/No Answer, or Off) and the destination.



- Choose Forwarding – Select from the drop down list the forwarding action to use.
- Destination – Define the number for the destination of the forwarding. This is left blank when using Forwarding Off.

System/PBX Command

This action can be used to send appropriate OAI commands to the PBX to perform functions. For example, you could have an action that sets your DND message to “UNAVAILABLE” using the following: N 16. You could then set this action to run each time you shutdown your phone.

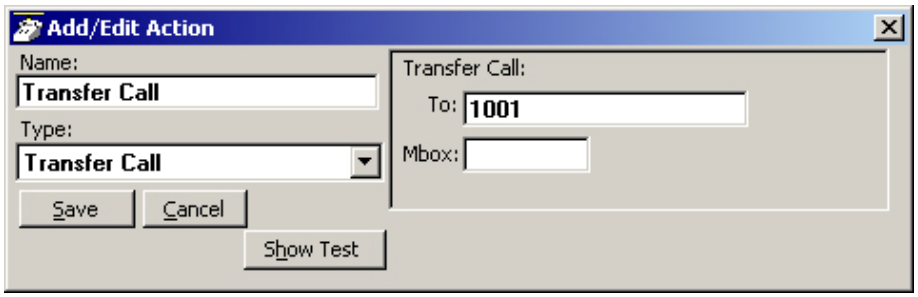


- System/PBX Command – Select from the list of available commands and edit the variable values (shown in quotation marks) as needed. The commands available are as follows:

ANSWER	
CONFERENCE	
DIALxxxxx	Where xxxxx – is the number to be dialed. Digits 0~9,*,#. A ‘,’ is a pause and ‘!’ is a hook-flash.. Parenthesis, semi-colons, dashes, and spaces are ignored, thus (01932) 829040 can be entered.
HANGUP	
HOLD	
MODIFYCALL “Field”, “Value	Recommend using Modify Call Information or Attach Acct Code action.
TRANSFER	Recommend using Transfer Call action.
Recording Option	When Recording is active on Strata Call Manager.
RECORD	
RECORDBKMAKR “Text	Substitute your bookmark text for “Text”
RECORDSTOP	
ACD Option	When ACD is available on some PBXs.
ACD HELP	
ACD PU	
SET WORKUNITS	

Transfer Call

This action causes the active call to be transferred to another phone, directly to a specific Voice mailbox, or to an outside phone number (i.e. 9,4969040).



- Transfer To – Enter an extension number or outside number to be called.
- Transfer Mbox – Enter a mailbox number if going to a Voice Mail number.

Action Variables

Strata Call Manager uses variables to provide information to actions. Strata Call Manager replaces the variable token code with the appropriate value when the action executes. For example, %P becomes '01932850001' when you receive a call from Toshiba.

Call Variables

Refer to the table below for call variables and their values.

Variable	Information
%A	Account Number
%B	Call Direction ("In" or "Out")
%C	DNIS Called Name
%D	DNIS/DID Number
%E	This Strata Call Manager's Extension Number. (Can be used for Primary DN or Secondary DN when using Set DND Action.)
%F	Call Forwarded from Extension number
%G	DND Message, when phone is in DND. (Can be used for Primary DN or Secondary DN when using Set DND Action.)
%H	Calling Number (hyphenated – type 1, format defined in agnt_ph.ini)
%I	TAPI Call ID
%J	Calling Number (hyphenated – type 2, format defined in agnt_ph.ini)
%L	Elapsed Time of Call (H:MM:SS)
%M	Main Listed Phone Number (Use with Export Call Info actions)
%N	CallerID Name (outside calls only, requires CallerID)
%OR("field") or %OC("field")	Outlook Calendar/Reminder "fields": 1. "SUBJECT" – subject field of Outlook event. 2. "START" – start Date/Time of event. 3. "END" – ending Date/Time of event. 4. "IMPORTANCE" – Importance (Low, Normal, High) of event. 5. "LOCATION" – location of event. 6. "ADVANCE" – number of minutes of advance notice. 7. "STATUS" – Busy status (Free, Busy, Out of Office) of event. 8. "STIM" – start Time without the Date. 9. "DIFF" – time difference before event start, e.g., 15 minutes will report "15 Minutes". Used for text to speech announcments.
%P	Incoming: CallerID Number / ANI; Outgoing: Dialed Number
%S	Call Answered ("Y"es or "N"o)
%T	Call Type ("IC" or "CO"): IC= Intercom call; CO= Outside call.

Variable	Information
%V	The Extra Call Info screen allows you to configure a button for each Call Info field. This variable,%V, contains the value of that Call Info field for use when defining an Action trigger.
%W	Contains ‘1’ if Outlook Link found a match in Outlook. Contains ‘0’ if Outlook Link did not find a match, or was not active.
%X(“name”)	Extra Call Info Field, i.e. %X(“Notes”). The name of the field must be in double quotations. For a list of field names in your system, go to Preferences > General Tab > Extra Info button, Add and use the pull down list for fields available on your system.
%Y	Contains the Outlook Unique Identifier if Outlook Link found a matching record in Outlook.
%Z	Call Status (“Ringing”, “Talking”, etc.)

Note: Insert +x following the ‘%’ character to restrict the variable value to the first ‘x’ or leftmost characters. Insert –x to restrict the variable value to the last ‘x’ or rightmost characters. For example, to pass the first 8 characters of the Calling Party Name, enter: %+8N. To send the last 4 digits of the Calling Phone Number, enter: %-4P.

System Variables

Strata Call Manager also uses System Variables for Action parameter strings, such as Date and Time. They can also provide some control over text logging actions with Carriage Return, Line Feed, Tab, and Random Numbers (for file names.) Note: Many System Variables duplicate the Action Variables to provide increased compatibility with legacy applications and 3rd Party Application Notes.

Variable	Information
&A	Account Number
&B	PBX Call ID
&C	Insert a Carriage Return character
&D	Insert the Date in format: “mm/dd/yy”
&E	Insert Extension Number of My Phone
&F	ACD Group Name
&G	Agent ID
&H	Calling Phone Number (hyphenated - type 1)
&I	TAPI Call ID
&J	Calling Phone Number (hyphenated - type 2)
&K	ACD Group extension number
&L	Insert a Line Feed character
&N	Calling Party Name (outside calls only)
&n	Insert the Date and/or time in user-specified format i.e. "&Nhh:mm:ss AM/PM&"
&P	Calling Phone Number
&Q	Random Variable (6 digits)
&R	Random Variable (8 digits)
&T	Insert the Time in format: "HH:MM" (24 hour clock).
&U	Insert the Time in US format: “H:MM AM/PM”.
&V1	VoIP Ringer Audio device (Soft Phone must be used to use)
&V2	VoIP Headset Audio device (Soft Phone must be used to use)
&X	Destination Field (for Export of Call Info)
&Y	Call Type (“IC” or “CO”): IC= Intercom call; CO= Outside call.
&t	Insert a Tab Character
%%	Insert a Percent “%” character
&&	Insert an Ampersand “&” character

Note: &T and &U variables accept a relative addition of time in the format &U+’30’ results in the current time plus 30 minutes. The number of minutes must be within single quotation marks. Example: A Set Phone Status Message action can be specified selecting the OUT TO LUNCH message and a second line of UNTIL &U+’30’. If this action is used at 11:55 AM, then the resulting message on Strata Call Manager is OUT TO LUNCH UNTIL 12:25 PM.

Examples for Text Reader/ Announcer:

Speak Reminder:	SPEAK,"Reminder,%OR("SUBJ"),Starting %OR("DIFF")",&V1,&V2
Speak Appointment:	SPEAK,"Appointment,%OC("SUBJ"),Starting Now",&V1,&V2
Announce Call:	CA,%T,&F,"%N",%H,&V1,&V2

Exporting Actions

Once an action has been designed, exporting the action is recommended to provide a backup copy as well as a file that can be copied to other Strata Call Managers. To export an action, you will need to be in the Add/Edit Action screen and click the Show Test button to reveal the testing parameters and the Export Action button. Pressing Export Action copies the details of the action into a special file named: xx.ACI where 'xx' is a number assigned by the software corresponding to the action number (i.e. 2.ACI).

This file is exported into the user's application data folder (typically, "C:\Documents and Settings\<user name>\Local Settings\Application Data\Toshiba\Strata Call Manager"). In order to identify the file more easily you may want to user Explorer to rename that file to something more appropriate (i.e. PLAYBELL.ACI). When renaming an action file always limit the file name to 8 characters prior to the .ACI extension. This file can then be copied to another PC to give a copy of the action to another user of Strata Call Manager. Leaving a copy in this folder provides a backup copy of the action. That will be then be loaded at startup if that action were deleted in the Actions List (see Importing Actions below for more details).

Note: When exporting an action, if a file with that name already exists, an error message will occur and the action will not be copied – when this occurs you will need to use Explorer to rename the existing file and then export again.

Importing Actions

When the Strata Call Manager program starts up, it automatically imports actions from the compiled NET_PHN.ACS action file plus all action files (*.ACx) it finds in its startup folder. The last character used in the extension of the file name defines how the action file is treated on importing:

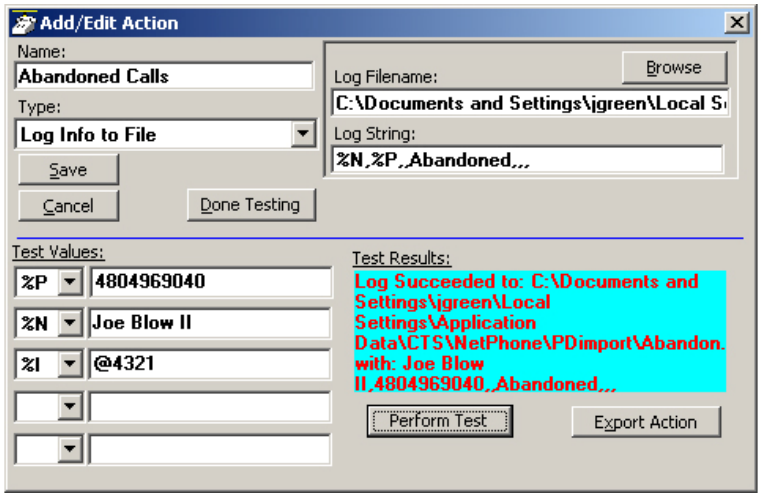
- .ACI – These files are individual actions created by Exporting Actions. These will be imported only when an action using the same action name does not exist in the compiled file. Thus, when this file exists and the user had made changes to this action, the user can revert back to the original operation by deleting the current action in Strata Call Manager then stopping and restarting Strata Call Manager.
- .AC1 – Upon startup, Strata Call Manager always imports all "One-Shot" action files (*.AC1). When an action of the same name exists, the action will be overwritten. Once imported, the One-Shot export files are deleted. These one-shot files can thus be used to import an action just one time allowing the user to change or delete the action as desired.
- .ACO – Upon startup, Strata Call Manager always imports all "Over-Write" action files and overwrites any action with the same name. These are useful to ensure the actions do not get changed or when making corrections on other Strata Call Managers.
- .AC0 – This type of file is only imported at initial startup of the Strata Call Manager or when the compiled actions file "AGT_PHN.ACS" is not found at startup.

These files allow you to design an action, export it, rename it, and then copy the file to all PCs that need that action. These are also useful to overcome a user accidentally deleting an action since they can have a copy of that file on their PC, when they exit and restart Strata Call Manager that action will be restored.

Testing Actions

While in the Add/Edit Action screen, a Show Test/Hide Test button is offered. Pressing this button when it is titled Show Test, will expand the window to a set of “Test Values” that can be set representing the variables used within the action. This sets the values of any real time variables for testing your action. For example, if your action will be using the “Phone Number” variable (%P, %H, or %J) you will want to set the test value of %P to the phone number you want to simulate (i.e. 7145551234). Then press the Perform Test button to test your action. The “Test Results” screen will show the results of the test and if the action fails, you can change the parameters of the action and test again. When another application is involved in the action, that application, in general, will need to be installed and running to perform the test. Pressing the button titled Done Testing will close the “Test Window”.

Note: If the action seems to work fine when you test it from this screen, but doesn't seem to work properly when the action is used by the Call Handler you may want to open the Main Menu Icon > Setup > Advanced > Show Events screen (see your System Administrator if you do not have the Advance menu item) to see what is actually occurring when that action is being used.



Personal Call Handler 6

This powerful feature of Strata Call Manager allows you to create Call Handling Rules to automatically take actions when certain events occur and specific conditions are true. That is, you create a rule so that (1) when an Event occurs, and (2) if certain conditions are true, and then (3) perform specific Actions. Following are a few examples of what you can accomplish with these Rules:

- When an Outside call with CallerID rings and I'm not on another call, popup Microsoft Outlook and lookup the caller info in the database.
- Whenever I answer a call without CallerID, automatically present a screen so I can type in the caller info for that call.
- Whenever I dial a call, automatically present a screen so I can type in the name for that call.
- When that nagging broker calls, immediately transfer him to my voice mailbox.
- I'm working on an important project, so whenever anyone other than my boss calls, immediately transfer them to V-mail.
- When my spouse calls, if I haven't answered the call within 5 seconds, play a special tone on my PC to alert me.

Note: Depending on your configuration you may not be able to change the Call Handler Rules, in which case you should check with your System Administrator.

The basic process for creating Personal Call Handling rules is to first define the actions you would like to accomplish and test them. Then you can create a Personal Call Handling Rule and choose which event will trigger the action(s) and then refine this by setting the conditions for when the trigger will occur.

Creating Personal Call Handling Rules

The following items will define how to edit, delete or add new rules. Many rules can be created and exist simultaneously. To allow rules to be defined and not applied, an enable/disable check box appears before each rule to make it easy to disable or enable different rules are different times.

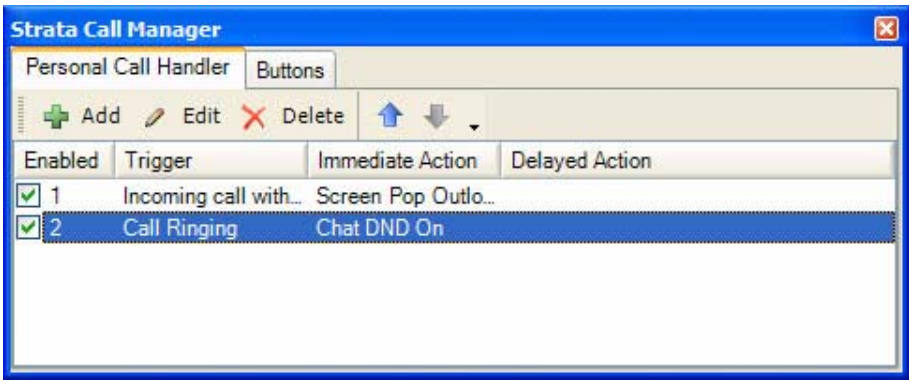
The order of the listing of the rules determines the sequence the rules will be used. Thus, some rules may prevent following rules to be used. For example, if the first rule in the list causes the call to divert to another station followed by a rule to Screen Pop Outlook, then the Screen Pop will never take place. If the rules were reversed, then the Screen Pop will take place prior to the call being diverted. In either case, the user may not see the Screen Pop since the call will leave this station, thus the Screen Pop will likely disappear as well. For the user to see who is calling and provide an ability to answer the call or “do nothing”, then creating the Screen Pop to occur immediately and the Call Divert action to occur using a time delay, then the two rules would result in displaying the Screen Pop and then pausing before diverting the call.

Note: This example was for illustration purposes. These two actions can actually be done within a single rule to make the creating of rules simpler.

To Open Call Handler Rules

1. Click the Personal Call Handler icon > Personal Call Handler tab.

   The following screen displays.



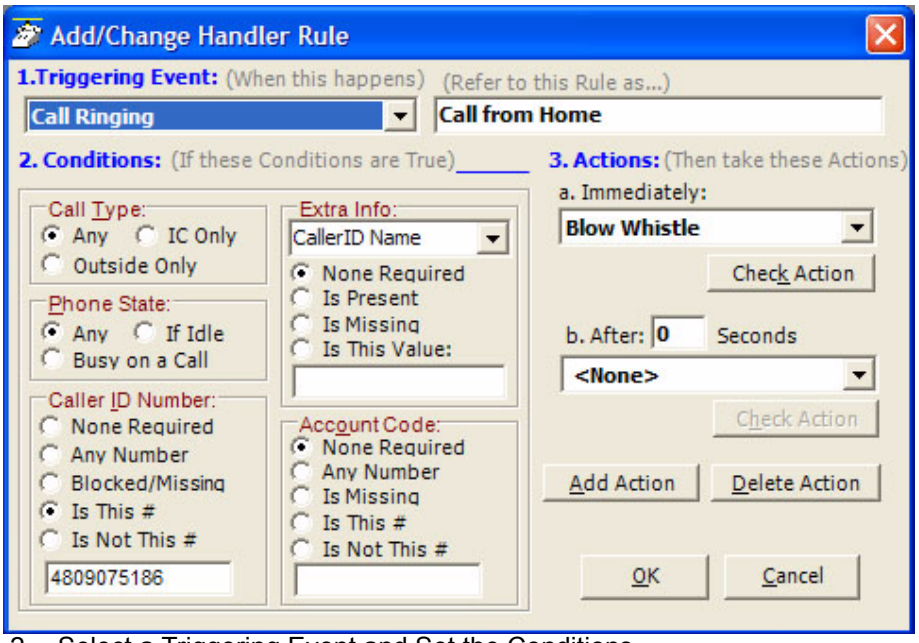
To Delete a Rule

- Highlight the rule to delete and click Delete.

To Add or Change a Call Handling Rule

1. Click the Add button

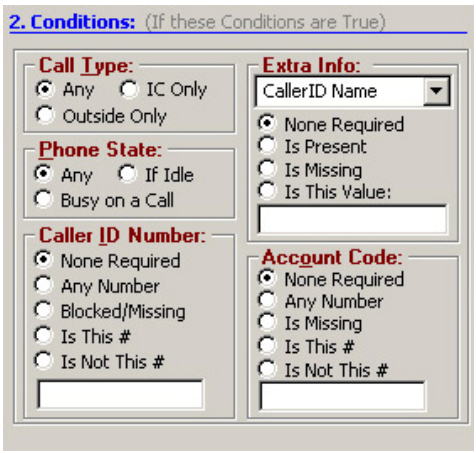
or highlight the rule to be changed and click Edit.



2. Select a Triggering Event and Set the Conditions

   The types of events that can be used to trigger a rule can be divided into call related triggers, system triggers, and status change triggers. Each grouping is shown below along with the Conditions offered for the trigger to take effect:

- **Call Ringing** – Whenever a call rings on the phone.Call Type – Select the call type for the ringing call.

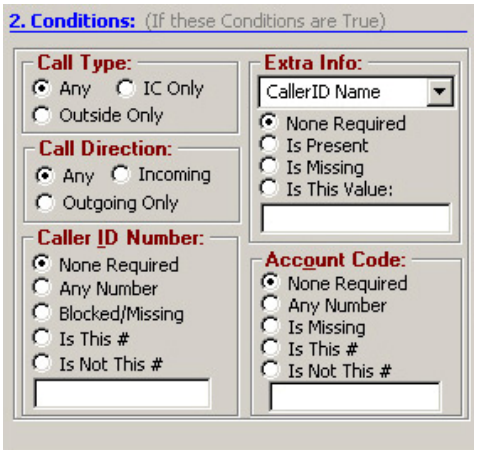


  - Phone State – Select the Phone State when the call arrives.
  - Caller ID Number – Select the Caller ID to be used in the trigger. For the last two options, enter a specific number in the box including wildcard characters when needed. See Like Matches and Unlike Matches for use of wildcards.
  - Extra Info – Select a “Field Name” (CallerID Name, or type in another field name) and then choose how to treat this information. For the last two options, enter a specific number in

the box including wildcard characters when needed. See Like Matches and Unlike Matches for use of wildcards.

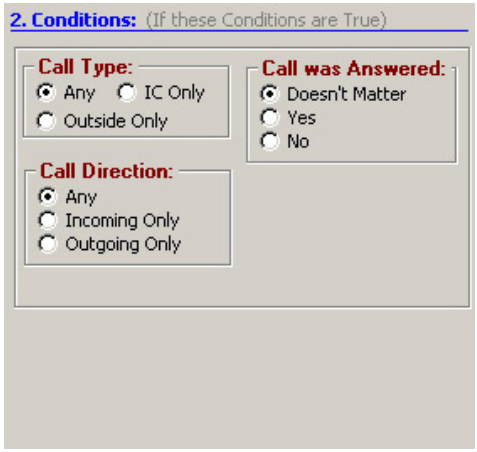
- Account Code – Select the account code type to be used. For the last two options, enter a specific number in the box including wildcard characters when needed. See Like Matches and Unlike Matches for use of wildcards.

- **Call Answered** – Whenever a call is answered on the phone.Call Type – Select the call type for the ringing call.



- Call Direction – Select the direction of the call to be triggered.
- Caller ID Number – Select a Caller ID number. For the last two options, enter a specific number in the box including wild card characters when needed. See Like Matches and Unlike Matches for use of wildcards.
- Extra Info – Select a “Field Name” (CallerID Name, or type in another field name) and then choose how to treat this information. For the last two options, enter a specific number in the box including wildcard characters when needed. See Like Matches and Unlike Matches for use of wildcards.
- Account Code – Select the account code type to be used. For the last two options, enter a specific number in the box including wildcard characters when needed. See Like Matches and Unlike Matches for use of wildcards.

- **Call Disconnect** – Whenever a call leaves the phone (whether the caller hung up or the call was transferred or forwarded).

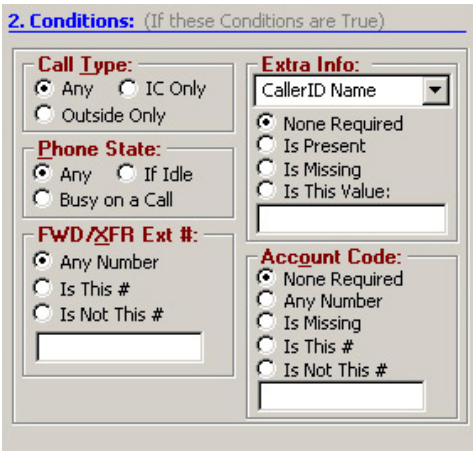


- Call Type – Select the call type for the ringing call.
  - Call Direction – Select the direction of the call to be triggered.
  - Call was Answered – Select whether the call was answered.

- **Phone Software Startup** – Happens whenever the Strata Call Manager software starts up and is in full operation with the PBX.

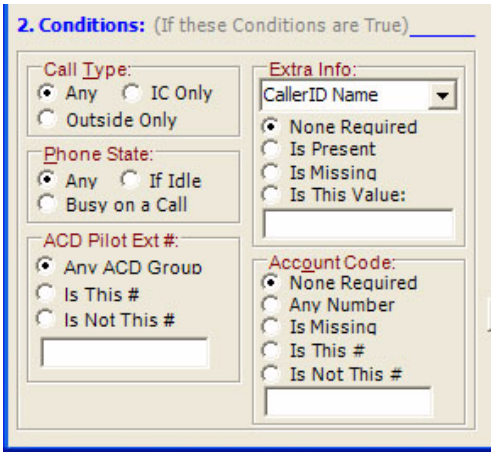
- **Phone SoftwareShutdown** – Happens whenever Strata Call Manager software is shutdown (using a normal Exit).

- **FWDed/XFRed Call Ringing** – Whenever a call rings on the phone that has been either Forwarded or Transferred from another extension.



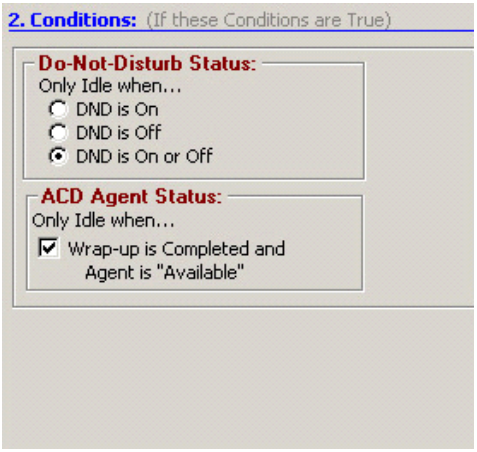
  - Call Type – Select the call type for the ringing call.
  - Phone State – Select the Phone State when the call arrives.
  - FWD/XFR Ext # – Select the extension number the call is from. For the last two options, enter a specific number in the box including wild card characters when needed. See Like Matches and Unlike Matches for use of wildcards.
  - Extra Info – Select a “Field Name” (CallerID Name, or type in another field name) and then choose how to treat this information. For the last two options, enter a specific number in the box including wildcard characters when needed. See Like Matches and Unlike Matches for use of wildcards.
  - Account Code – Select the account code type to be used. For the last two options, enter a specific number in the box including wildcard characters when needed. See Like Matches and Unlike Matches for use of wildcards.

- **ACD Call Ringing** – Happens whenever a call rings on the phone that is part of an ACD group (ignores non-ACD calls).



  - Call Type – Select the call type for the ringing call.
  - Phone State – Select the Phone State when the call arrives.
  - ACD Pilot Ext # – Select the pilot number the call is from. For the last two options, enter a specific number in the box including wild card characters when needed. See Like Matches and Unlike Matches for use of wildcards.
  - Extra Info – Select a “Field Name” (CallerID Name, or type in another field name) and then choose how to treat this information. For the last two options, enter a specific number in the box including wildcard characters when needed. See Like Matches and Unlike Matches for use of wildcards.
  - Account Code – Select the account code type to be used. For the last two options, enter a specific number in the box including wildcard characters when needed. See Like Matches and Unlike Matches for use of wildcards.

- **Status is Idle** – Whenever the station is idle and the DND button is toggled or whenever an ACD agent ends “wrap-up” time and becomes available to take a call.

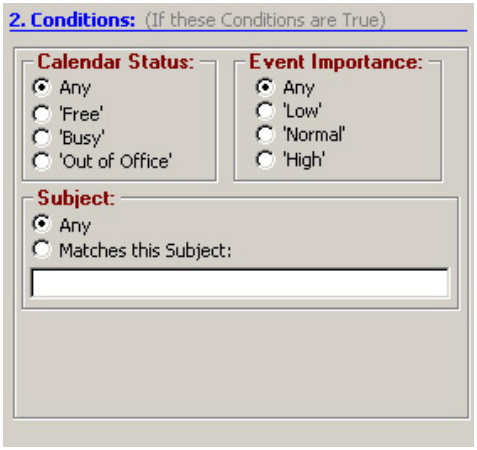


- Do Not Disturb Status – Select whether the station is to be considered idle when the DND Status is...
  - ACD Agent Status – Check the box to trigger when an agent goes idle after completing the “wrap-up”.

- **Change in DND Status** – Whenever the DND or message status change takes place, the message set is checked to see if it matches the defined conditions.

  - Do Not Disturb Change – Select the DND Status change to cause the trigger. For the item with a message to match, enter the beginning characters of the message. See Like Matches and Unlike Matches for use of wildcards.
  - Affected Phone – Select whether this rule will be based upon My Phone or My Secondary Extension.

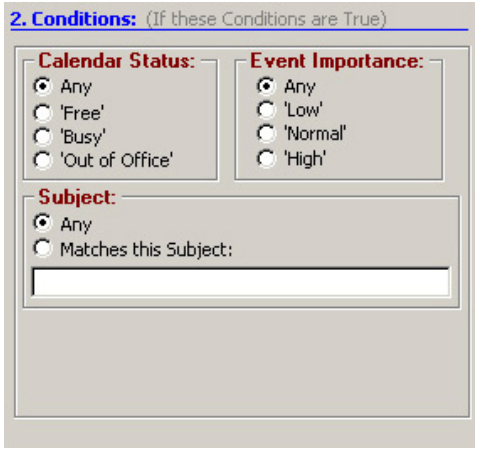
- **Outlook Calendar Appointment** – An event that occurs at the start time of the appointment and again when the appointment time ends (‘Free’).



  - Calendar Status – Select to match the Outlook Calendar Status options: Any, Free, Busy, Out of Office.
  - Event Importance – Select to match the Outlook Calendar Importance options: Any, Low, Normal, or High.
  - Subject – Select either Any or Matches this Subject. For making the match enter the text for the subject to match. See Like Matches and Unlike Matches for use of wildcards.

Note: Outlook Calendar may also send a ‘Tentative’ status setting which is treated using the ‘Any’ setting.

- **Outlook Calendar Reminder** – An event that occurs at the time scheduled for sending the reminder message for an upcoming appointment. This event will trigger again if the appointment time is changed after the Reminder event was previously given.



  - Calendar Status – Select to match the Outlook Calendar Status options: Any, Free, Busy, Out of Office.
  - Event Importance – Select to match the Outlook Calendar Importance options: Any, Low, Normal, or High.
  - Subject – Select either Any or Matches this Subject. For making the match enter the text for the subject to match. See Like Matches and Unlike Matches for use of wildcards.

Note: Outlook Calendar may also send a ‘Tentative’ status setting which is treated using the ‘Any’ setting.

Like Matches

When you design a Rule to trigger using a Specific Number (for the CallerID number or Account number) or on a Specific Name (for the CallerID name) you can design the rule to either search for an exact match or a “LIKE” match. A “LIKE” match simply uses wildcard characters in the string that you specify to accept a range of values. The following wildcards are available:

?Any single character

*Zero or more characters

#Any single digit (0-9)

Example 1: To trigger on any caller from your area code 602: Set the Specific Number on Caller ID Number to: 602*

Example 2: To trigger on any caller from your local office code 496: Set the Specific Number on Caller ID Number to: 602496?

Example 3: To trigger on any caller with a caller ID name starting with C: Set the Specific Name on Caller ID name to: C*.

Unlike Matches

In addition, you can precede any of the search strings with the characters <> to request all matches that “aren't equal” or “aren't Like”.

Example: To trigger on any caller from NOT from your area code 602: Set the Specific Number on Caller ID Number to: <>602*.

3. Apply User-Defined Actions – This section will define how to apply the User-Defined Actions to a Personal Call Handling Rule.
    - Set an Immediate Action – Pull down the listing and select the action to be applied immediately. Either an Immediate or a Delayed Action is needed for the rule to be complete.
    - Set a Delayed Action – Define the number of seconds to delay the action and then pull down the listing and select the action to be applied. Both immediate and delayed actions can be performed in the same rule.
    - To Check the Action – Clicking the Check Action button will transfer you to User Defined Actions to allow changing the action and/or test the action.
    - To Add an Action – Click the Add Action button to transfer to User Defined Actions to allow you to create a new action to be used.
    - To Delete an Action – Click the Delete Action button to remove an action from the listings. Use this with caution, as this will remove the action for all other functions as well.
4. Complete the Rule
    - To Save Rule – Click the Save button to save your changed or new rule.
    - To Cancel Settings – Click Cancel to exit without saving the settings.
    - To Export Call Handler Rule – Click the Export Rule to create a.RUI file in the PC user’s “C:Document and Settings\Application Data\Toshiba\Strata Call Manager” folder. Each rule created can be saved as a file for backup purposes and copying to another PC to allow the same rule to be used by other users.

Export Rules

Once a rule has been designed, exporting the rule is recommended to provide a backup copy and that file can be copied to other Strata Call Managers. To export a rule, you will need to be in the Add/Edit Rule screen and click the Export Rule button. Pressing Export Rule copies the details of the rule into a special file named: xx.RUI where 'xx' is a number assigned by the system corresponding to the rule number (i.e. 2.ACI).

The file is exported into the user's application data folder (typically, "C:\Documents and Settings\<user name>\Application Data\Toshiba\Strata Call Manager"). In order to identify the file more easily you may then want to user Explorer to rename that file to something more appropriate (i.e. PLAYBELL.RUI). When renaming a rule file always limit the file name to 8 characters prior to the .RUI extension. This file can then be copied to another PC to give a copy of the rule to another user of the Strata Call Manager. Leaving a copy in this folder will provide a backup copy of the rule that will be loaded at startup of Strata Call Manager if that rule had been somehow deleted in the Personal Call Handler Rules List (see Importing Rules below for more details).

Note: When exporting a rule, if a file with that name already exists, an error message will occur and the rule will not be copied – when this occurs you will need to use Explorer to rename the existing file and then export again.

Importing Rules

When the Strata Call Manager program starts up, it automatically imports rules from the compiled NET_PHN.RUL rules file plus all rule files (*.RUx) it finds in its startup folder. The last character used in the file name extension defines how the rule file is treated when importing:

- .RUI – These files are individual rules created by exporting. These will be imported only when a rule using the same name does not exist in the compiled file. Thus, when this file exists and the user made changes to this rule, the user can revert back to the original operation by deleting the current rule in Strata Call Manager then stopping and restarting Strata Call Manager.
- .RU1 – Upon startup, Strata Call Manager always imports rules from all "One-Shot" rule files (*.RU1). When a rule with the same name exists, the rule will be overwritten. Once imported, the One-Shot export file is deleted. These one-shot files can thus be used to import a rule just one time allowing the user to change or delete the rule as desired.
- .RUO – Upon startup, Strata Call Manager always imports all "Over-Write" rule files, which overwrites any rule of the same name. These files can be useful to ensure the rules do not get changed or when wanting to make the same update on other Strata Call Managers.
- .RU0 – These are another type of rule file that is imported only at initial startup of the program or when the compiled rules file "AGT_PHN.RUL" is not found at startup.

These types of files allow you to design a rule, export it, rename as needed and then copy the exported file to all PCs that need that rule. These are also useful to overcome a user accidentally deleting a rule, since exiting and restarting Strata Call Manager will restore that rule.

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Using Microsoft Outlook 7

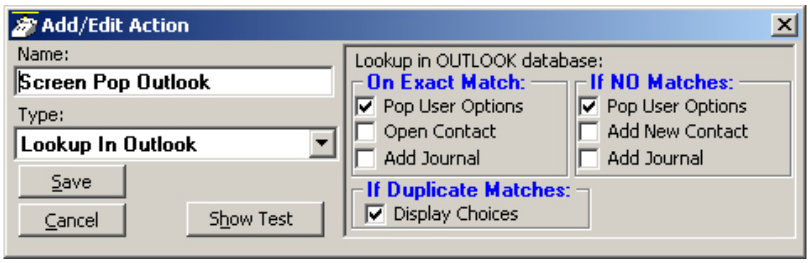
Dialing from within Outlook

When Outlook Phone Link has been installed, a "Phone Icon" will appear on your Outlook main Tool bar. Then when you are in any Outlook Contacts folder and you have a contact highlighted, you can press this button to dial. A dialing screen will pop up showing each of the phone numbers available for that contact. Simply select the appropriate phone number and press the Call button to place the call. Note: Please refer to the on-line help file in Outlook Phone Link for available dialing options.

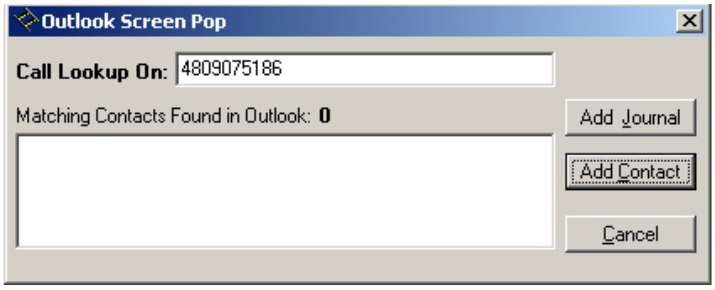
When the call is being dialed in Strata Call Manager, the name from the Contact will be automatically attached to the phone call (for display on the LCD, the Call Key, SMDR, etc).

Incoming Calls

Using the Personal Call Handler you can set up a rule(s) to automatically run the "Lookup In Outlook" action. This action will then lookup the phone number in Outlook and, depending on how your action is configured, will pop open a Contact and/or a Journal.



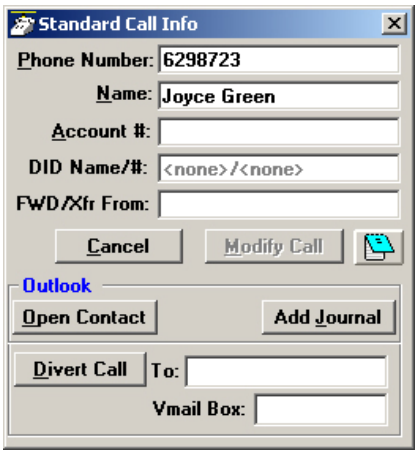
Note: If you setup a rule to trigger on "When Ringing", you may NOT want to have the action automatically open a Contact or Journal because it will do this for every matching call whether you are present or not. So, if while you're away from your desk, you have missed 20 outside calls that rang on your phone, you could have 20 different Contact screens and 20 Journal screens popped up on your PC screen. A better alternative is to have your "When Ringing..." trigger use Pop User Options instead of the Open Contact or Add Contact or Add Journal options. Now, when a call is ringing on your phone, a small "User Options" window will pop up showing the Contacts that match the phone number (if any) as well as buttons that let you manually "Open/Add Contact" or "Add Journal".



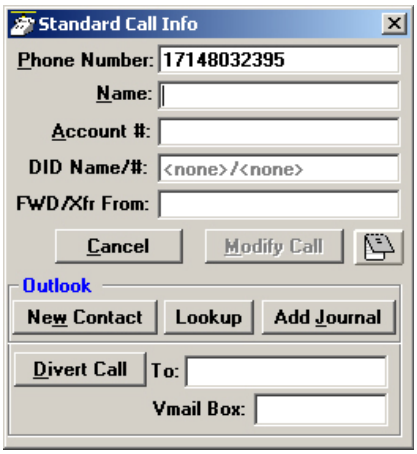
With this, you can see the information about who is calling and then can manually open a Contact or Journal. If opening a contact/journal manually is not desirable, you could also have a 2nd 'trigger/action' so that when you "Answered" a call it would automatically open a Contact and/or Journal as desired.

While on a Call

Whenever you are on a telephone call (incoming or outgoing) you can right-click on the call (Call Information or LCD Display window) and select “View Info” to pop up the Standard Call Info screens shown below. Within these screens, buttons are offered to Open Contact, create a New Contact, Lookup the person in Outlook, or open a Journal (Add Journal) entry in Outlook. These screens can also automatically pop up by setting up a Personal Call Handler rule using a trigger to run the "Popup Call Info Screen" action (i.e. whenever you answer a call). A feature may also be available to you, depending upon support for your system, to divert the call (Divert Call) to another destination.



Contact Match found



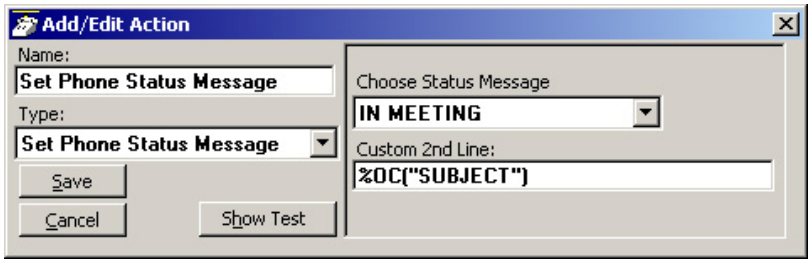
Contact Match not found

Integrating with Outlook Calendar

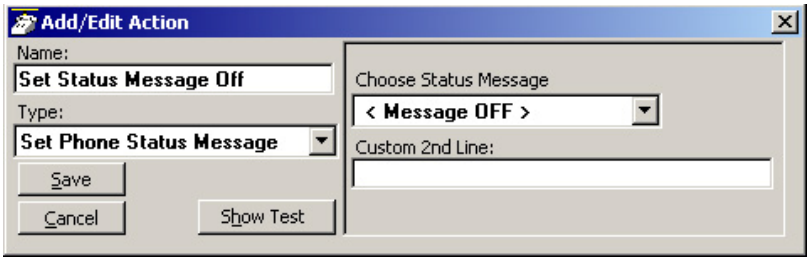
One typical integration with Outlook Calendar is to put Appointment information on DSS key so that all other Strata Call Manager users know your current presence status. This example will turn on the DSS key with Status Message only and turn off the message when the scheduled meeting is over.

Create Actions to set and clear the DSS Message

The first Action will set a Status Message and add the Subject field of the Appointment as part of the message. On the DSS key, the first line and second line are appended to each other, thus the preset Status Message can be modified to become something very simple to allow for the Subject to become the predominant part of the message.



The second Action will clear the message when the appoinment ending time is reached.



Create Personal Call Handler Rules

Two Personal Call Handler Rules will be needed, both using the Outlook Calendar Appointment event which sends a message when an appointment starts and a second when it ends. In this example, I want to trigger the setting of the DSS message for any Calendar Status to ensure all appointments are reflected and also for any Event Importance and any Subject. These items are part of the appointment created in Outlook Calendar. When this event triggers, I want to use the first Action that I created which sets a message "In Meeting" and appends the Subject line to the message to be displayed.

The second rule will trigger only when the Appointment sends an indication of the Appointment be set to a "Free" status. The action is to turn off the DSS message.

The Final PCH Rules

The main thing is to ensure that the PCH rule to "Clear DSS Message" must follow "Set DSS Message". If not, the "Set DSS Message" triggers on 'any' Calendar Status including 'Free' and the clear command would be followed by a command to set the message, thus the message would never clear. The final set of PCH rules should be in the order of items 3 and 4 in the PCH Rules screen.

Using Companion Applications 8

Strata Call Manager provides a powerful open architecture that allows companion applications to add features and functions. These companion applications are provided as tabs on the Main Screen.

Strata Call Manager ships with several companion applications, including ACD Viewer, Buttons, History, Contacts, Chat, Dialer, and Web Browser.

The companion applications are docked in the lower panel of the Strata Call Manager screen and are accessed using the tabs. Users may also undock the companion applications and place them anywhere on the desktop. Use the Fly Out/In button to dock and undock the companion application with Strata Call Manager. To bring all the companion application back, go to Preferences > Revert.

The Contacts and History applications have a function called grouping. To group and ungroup, drag a column header to the bar above the column headers, then drag back to ungroup.

The Wheel icon in each of the companion applications tab is for set up functions. It changes depending on the application you are in.

The Companion applications have their own toolbars. Some of the icons on the tool bars may appear in more than one application toolbar and some may only specific to an application. The table below describes the various icon visible on the toolbars.

Table 1 Companion Application Tabs Toolbar Icons

Icon	Definitions
	Fly in / Fly out icon – Available in all applications. This is used to dock or undock the application.
	Setup – Available in all applications. Clicking this icon brings up the appropriate setup dialog box to configure the appropriate application.
	Export – Available in Contacts and History. Export the listing using either a CSV, Text, pdf, and Excel formats.
	Print Calls – Available in Contacts and History. Prints a listing of all entries shown in Contacts and History tabs. Change the position and width of the columns prior to printing to format the printout as desired.
	Filter – Available in Contacts and History. In Contacts, you can filter by name only. In History, you can filter by dates, call types, phone numbers, names, and account codes.

Table 1 Companion Application Tabs Toolbar Icons

Icon	Definitions
	Call – Available in Contacts and Chat. Click to make a call.
	Chat – Available in Contacts and Chat. When you find a contact that is idle, you can select that contact and click on the chat icon to chat.
	Add Directory – Available in Contacts. Click in Directories listings tab to add a new directory. It does the same function as right clicking in the Directories listing and clicking Create Directory.
	Add Groups – Available in Contacts. Click in My Groups listings tab to add a new group. It does the same function as right clicking in the My Groups listing of groups and clicking Create New Group.
	Search – Available in Contacts. Enters Search mode. For more details, refer to "Searching Entries" on page 89.
	Change Agent ID – Available in ACD Viewer. This brings up the group log in/log out menu.
	Reset Chat – Available in Chat.
	View Chat log – Available in Chat. Opens up Chat log.
	Copy – Available in Chat. Copies the Chat group.
	Delete – Available in Chat. Deletes a chat group.
	Broadcast to a selected chat group – Available in Chat. Sends out a broadcast message to members in a group. Refer to "To Send a Broadcast Message" on page 111 for more details.

Contacts

The Contacts companion application tab has Directories, Presence status and Speed Dial combined.

The Contacts tab lists current phone directories. Phone directories will include “CIX Directory” (created by default), and any personal directories that you create.

Sorting Entries

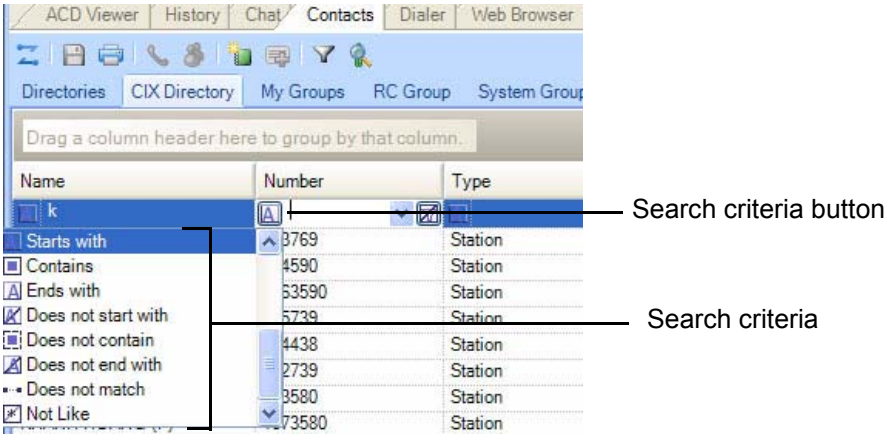
Click on a column header to sort the entries using that column. Click the same column header again to reverse the sort from ascending to descending (or vice versa). A small, light colored arrow in the column header indicates the current column used for sorting.

Searching Entries

Press the Search button (next to the Filter icon) to go into search mode. Above each column is a search area in which to type search criteria.

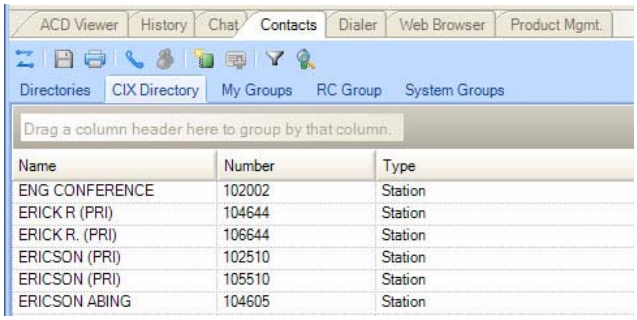
All the entries that match the search criteria will be shown, while the rest are hidden.

The default search method is “Starts with”, where only entries starting with the same letters as the search criteria will be shown. Other search methods are available, and can be accessed with the button to the left of the search area.



CIX Directory

List of names and extensions on the telephone system.



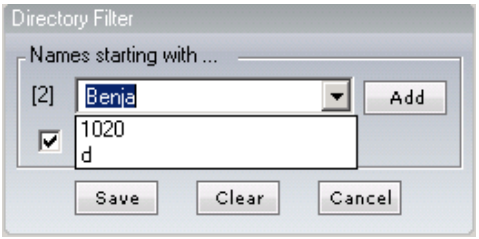
- To Call – Press Enter to dial the highlighted number, or double-click the desired name from the list.
- Drag and Drop to Create Speed Dial Button – Drag an entry from the Directory to a Programmable User button to automatically create a Speed Dial button with the selected extension number.

- **Additional Options** – The menu icons under the tab let you access other functions:

Note: Not all options may be available due to the settings for the tab.

  - Call Now – Place a phone call to this person or extension. (Same as double-clicking.)
  - Edit – Allows you to Add, Change, Delete, and Copy entries (typically available only in the Personal directory).
  - Print Listing – Print a listing of all entries shown in the directory. Change the position and width of the columns to format the printout as desired. Use Filters and Find to print only the entries you want.
  - Export Listing – Export the listing using either a CSV or Text format.
  - Chat – Initiate a chat call to the person at this extension (Extension directory only, target must have Chat installed and running.)

- Filtering Entries – Many PBX systems use default names for unassigned extensions. You many not want these unnecessary entries in the Directory, so Strata Call Manager provides a Filter to remove certain items from the list.
  - Press the Filters button to access the Directory Filters screen.



- Enable the Hide Names option to enable the filter.
- To Add a Filter Entry – Place the cursor in the text box.
  Type in the characters to be filtered and press Enter or click the Add button.
- To Delete a Filter Entry – Use the pull down list and select an entry to be removed and press Del.

The filter strings are case sensitive and will hide all entries starting with exactly the same string of characters. Entering “A” hides all entries that begin with an uppercase A.

Personal / Speed Dial Directory

List of telephone numbers. The user may add entries to provide fast access to frequently dialed numbers.

- To Call – Press Enter to dial the highlighted number, or double-click the desired number from the list.
- Add by Drag and Drop from Outlook – Drag a contact from Microsoft Outlook to the Directory and automatically add to the list.
- Add by Drag and Drop from Call History – Drag a number from the “Call History” window to the Directory to add the number to the list.
- Drag and Drop to Create Speed Dial Button – Drag an entry from the Directory to a Programmable User button to automatically create a speed dial button with that phone number.
- Additional Options – Right-click on the entry to access a menu of other functions:
- Call Now – Place a phone call to this person or extension. (Same as double-clicking.)
- Edit – Allows you to Add, Change, Delete, and Copy entries (typically available only in the Personal directory).
- Lookup in Outlook – Lookup this number in Microsoft Outlook and open the matching contact.
- Print Listing – Print a listing of all entries shown in the directory. Change the position and width of the columns to format the printout as desired. Use Filters and Find to print only the entries you want.
- Export Listing – Export the listing using either a CSV or Text format.

Presence Viewer

This capability is integrated in the Contacts companion application tab. Click on a Group tab within Contacts. Note that you can create as many groups as needed. You can look at the Presence status of members in each group.

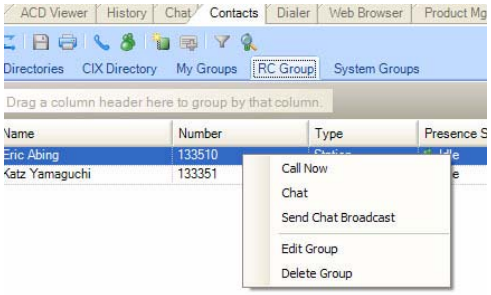
To add a Group

1. Select by clicking on the My Groups or System Groups tab.
2. Right click and select Create New Group.

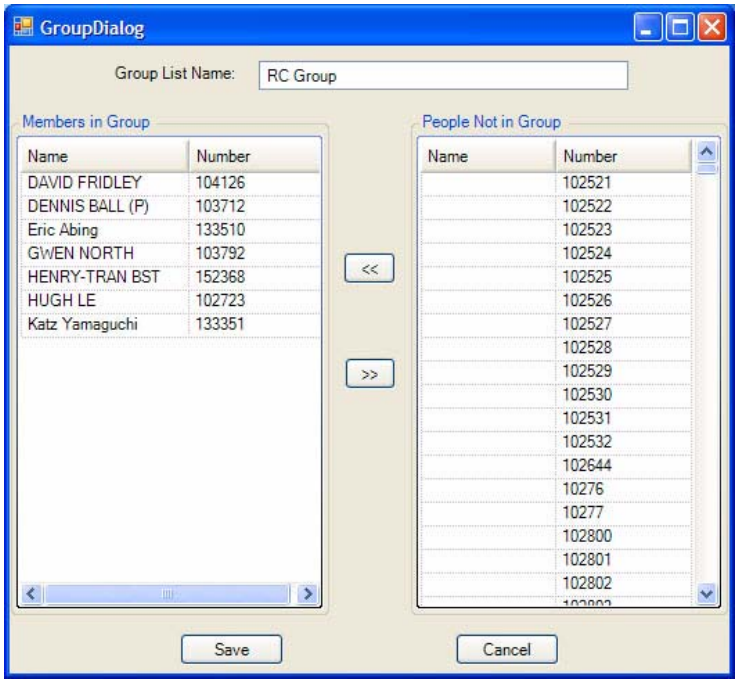
Note: The different between “My Groups” and “System Groups” is that “My Groups” is personal and you can create their own. “System Groups” applies to all and only a user with “Admin” right can create and change the group entry.

To manage the Presence Viewer

1. Click the Group tab assigned for the Presence Viewer.
2. Right click on an entry for options to either call, chat, broadcast, edit or delete group.

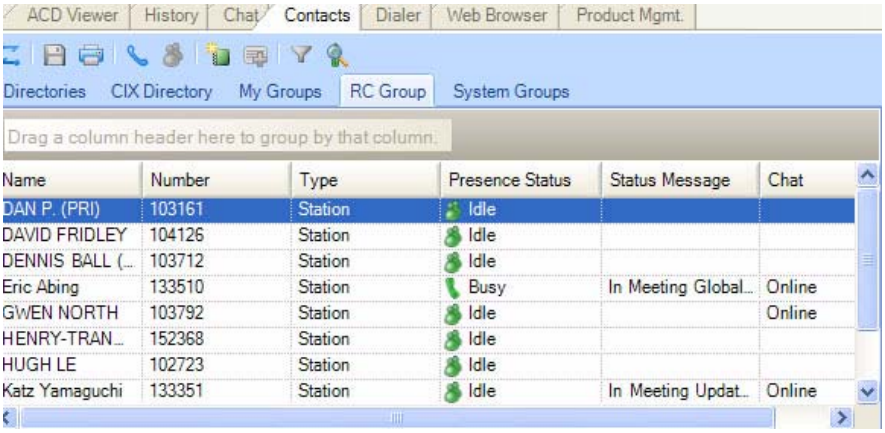


3. When you select Edit group, the following dialog box displays. Use the double arrow buttons to add or remove users from the group (shown right).



To use view Presence Status

The Presence status shows the status of users, such as Idle, Busy, etc.

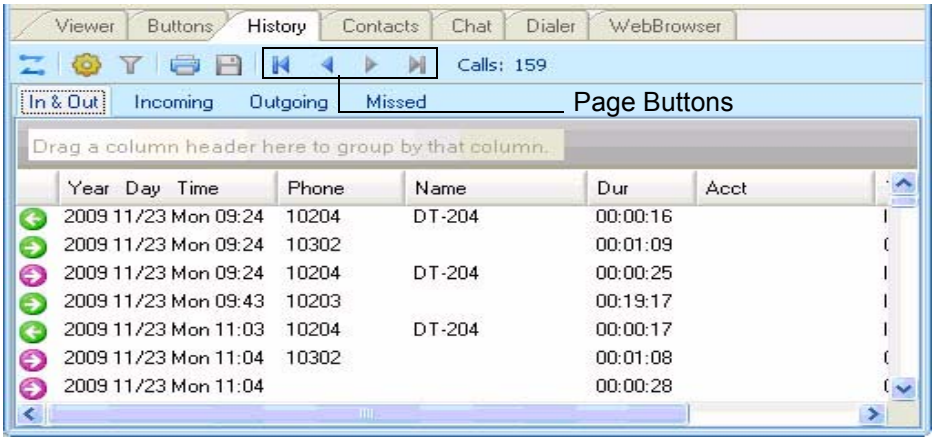


- Right click the member to start Chat or call the person through Strata Call Manager.

- The binocular icon on the top left provides menus such as Sort or Icon view as well as Help.

History

Strata Call Manager automatically creates a log of calls dialed and received on the local telephone extension. This Call History provides the user with a valuable log of his or her phone calls.

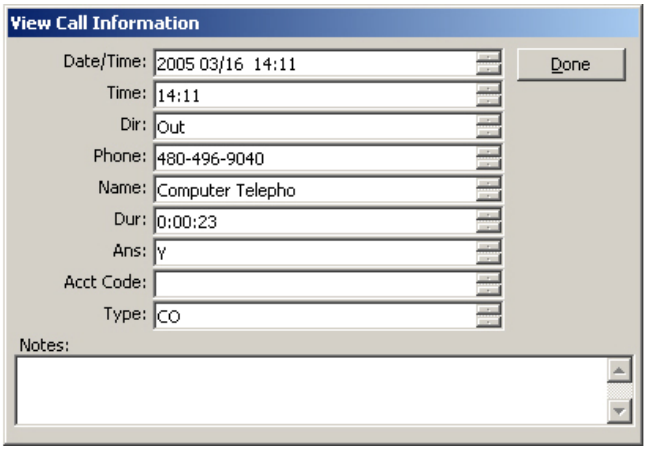


- Pages Buttons – In addition to the other toolbar icons, you can use the First Page, Previous Page, Next Page, and Last Page icons/buttons to navigate between the various pages. Call History creates Pages when the call log exceeds a certain number of Call records to improve performance. The Last page contains the most recent calls.
- Call Information – Each call in the call history appears as one line in the Call Display area. The column headers indicate what information is shown in each column.
    - Column 1 (Icons) – Indicates whether or not a call is an incoming call or outgoing call (arrow pointing right = incoming, arrow pointing left = outgoing) and the call is answered or not (Green = answered, pink = not answered).
    - Year Day Time – Shows the date and time that the call completed (not started). This column also includes the day-of-week for the first call of each day.
    - Phone – the phone number you dialed (outgoing,) or the CallerID Number / ANI (incoming.)
    - Name – The name of the person you called (based on Outlook), or who called you (based on CallerID.)
    - Dur –The Duration or length of time the call spent on this Strata Call Manager extension, in hours, minutes, and seconds. This time does not include any time the call spent on any other extensions before or after being on this extension.
    - Acct Code – Shows the account code, if any, that was attached to this call. Customers often use Account Codes to indicate something about the call, such as the Customer ID, the result code of the call (i.e. “order was placed”, “needs follow-up”, “unable to reach – party was busy”), etc. This account code could have been attached to the call prior to reaching this phone, or it could have been added or changed by you while it was on your extension. Call History logs the current Account Code when the call leaves the Strata Call Manager extension.

- Type – This can either be IC or CO indicating the type of call, internal or external. It also indicates the Station (ACD/Hunt Group, Announcement (AA), and voicemail.
- Notes – Shows the 'Notes' that were taken during this call. These Notes could have been attached to the call prior to reaching this phone, and/or they could have been added or changed by you while it was on your extension. Call History logs the current set of Notes when the call leaves the Strata Call Manager extension.

- To Call – Double-click the desired number from the list.
- Drag and Drop to Call – You can select a call and then use your mouse to drag and drop it to either the Call window or the LCD Display to start the dialing of that number.
- Drag and Drop to Create Speed Dial Button – You can select a call and then use your mouse to drag and drop it to a Strata Call Manager button.
- Drag and Drop to Add to Speed Dial List – You can select a call and then use your mouse to drag and drop it to your Personal Directory.
- Additional Options – Right-click on the entry to access a menu of other functions:
  - Call Now – Dial the phone number using Strata Call Manager.
  - View Info – Provides a read-only view of all of the information about the call, including the "Notes."

Note: You cannot change this information – you can view and copy/paste it to other applications.



- Lookup in Outlook – Look up the telephone number in Microsoft Outlook and open any matching Contact.
- Listen to Call – When the Tracer Integration is provided, this button provides a link to Replay to allow the recording to be played back.

The following functions are available on the toolbar:

- Find Similar Calls (Filter icon) – Enables the Filters option pre-configured with information to match the selected call. This is very useful for finding calls made to or received from a certain person or phone number.
- Print Calls (Printer icon) – Prints a listing of all entries shown in Call History. Change the position and width of the columns prior to printing to format the printout as desired.
- Export Listing (Export icon) – Export the listing to either a CSV, Text, Excel or Text format.

- **Filtering** – Use filters to limit the number of calls or view a certain type of calls. For example, you might want to see only the calls you made/ received in the last 7 days. Or you want to see all Outgoing calls made to a specific area code since the first of the year.

1. Press the “Filters” icon to open the Call History Filters screen.

Note: The filters button changes from Grey to Green when filters are active. This serves as a reminder that the call display list may not display all call records while filters are active.

2. Select the options and data for the calls that you want to see.
   - Dates – Select the date(s) – “All” means any date.
   - Call Direction – Choose whether you want to see incoming (“In Only”), outgoing (“Out Only”), or all calls (“In & Out”.)
   - Phone Numbers – Choose “All” for calls made to/from any number. Use the “Matching” option to limit the search to calls made to/from specific numbers. You can enter a specific phone number (like 01932-850001,) the last part of a number (850001 ,) or the first part of a number (01932+) to find all matching calls. You may also use wild cards, such as: 01932-???-001 and 01932-850*.
   - Names – Choose “All” for calls to/from any name including blank names. Use the “Starting with” option to limit the search to calls with a specific name. Enter an entire name (Jack Jones) or just the first part of a name (Jac). The name search is NOT case sensitive.
   - Account Codes – Choose “All” for calls with any or no account code. Use the “Starting with” option to limit the search to calls matching or starting with a specific account code. For example, ‘123’ returns calls with account codes 123 and 123xxx.

3. Press the Search button to find the calls (on the current page) that match ALL of the selected options. Call History will update the “Calls” counter and “Call Display” area on the main screen.

- Search Button – Finds the calls (on the current page) that match ALL of the selected filtering options.
- Clear Filters Button – Resets all filters to ‘Off”. Press Search to re-load all Call History record. Or, select new filter settings and start a new Filter search.
- Cancel Button – Closes the filters screen with no update to the “Calls Display”.

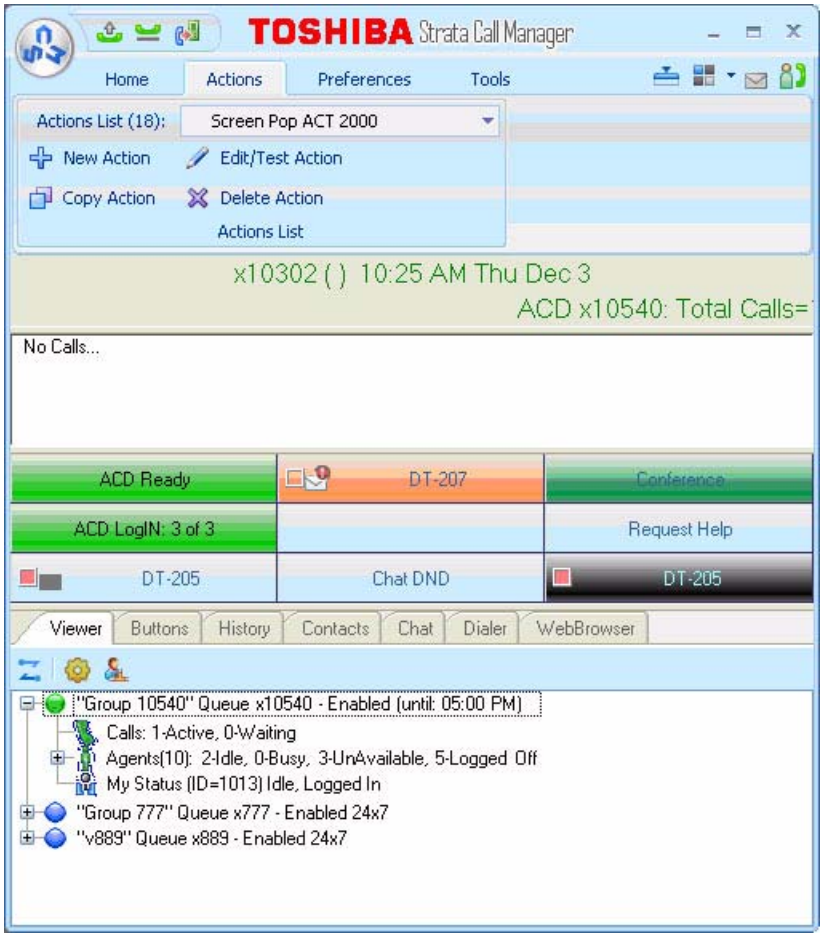
ACD Viewer

The Strata Call Manager ACD Viewer program allows Strata Call Manager users connected to Strata ACD to view the status of all ACD groups in which they are members. It shows the operating status of each group and as the group becomes busier it changes colors and can provide warning sounds to alert you of status changes. You can expand each group view to see the number of calls and the status of each of the agents and supervisors in the group. Each group contains a “My Status” icon showing your own status in the group (logged in, logged out, busy, in wrap-up, etc.), and when you right-click on your icon you can change your status.

The ACD Viewer is fully integrated with the Strata Call Manager Chat so you can easily place a chat call to a supervisor or another agent by simply right-clicking on that person’s icon. Plus you can broadcast a chat notification to all agents and supervisors in the group.

ACD Viewer appears by default as a companion application tab.

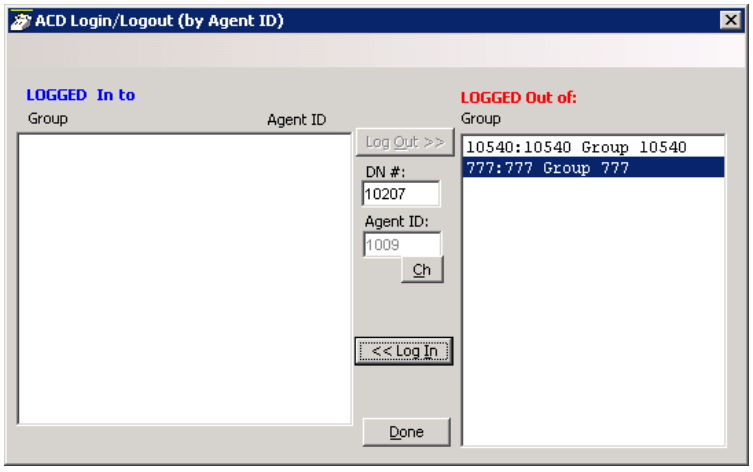
Note: Strata ACD must be operating in Enhanced Mode for ACD Viewer to be used.



The ACD actions can be used to Log In / Log Out to/from ACD groups. Going temporarily unavailable and an ability to end wrap times can be part of the features available. Additional Call Center features are possible using User Programmable buttons.

Logging In or Out

- Click the Change Agent ID icon to open the ACD Login/Logout window.



Note: The right list box shows available groups for the identified agent number. The left list box shows groups currently logged into.

To log into or out of one or more groups

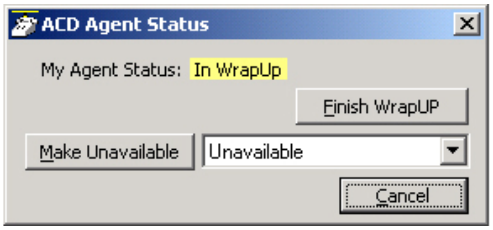
1. Highlight the group name(s) in the right-hand box and click <<Log In. If your Agent ID is listed as a Supervisor, then the Supervisor: Take Calls check box will be offered on your screen. Placing a check in this box will log you in to take calls for the group(s) selected when <<Log In was pressed.
2. Click Done when finished.
3. The ACD Key will display the number of ACD groups the extension is logged into and the total number of ACD groups you are a member.

To Log Out

1. Highlight the group name(s) in the left-hand box and click the >>Log Out button.
2. Click Done when finished.

Changing Agent Status

1. Right click My Status once you have expanded the views in the ACD Viewer pane. The following ACD Agent Status window will appear:



To Make Agent Unavailable

1. Use pull-down list and choose a reason.
2. Click the Make Unavailable button.
3. Click Done.

To Make Agent Available

1. Click the Make Available button.
2. Click Done.

To Set the ACD Status to WrapUp

1. Click Set WrapUp button.
2. Click Done.

Note: The Set WrapUp button is NOT available on all installations.

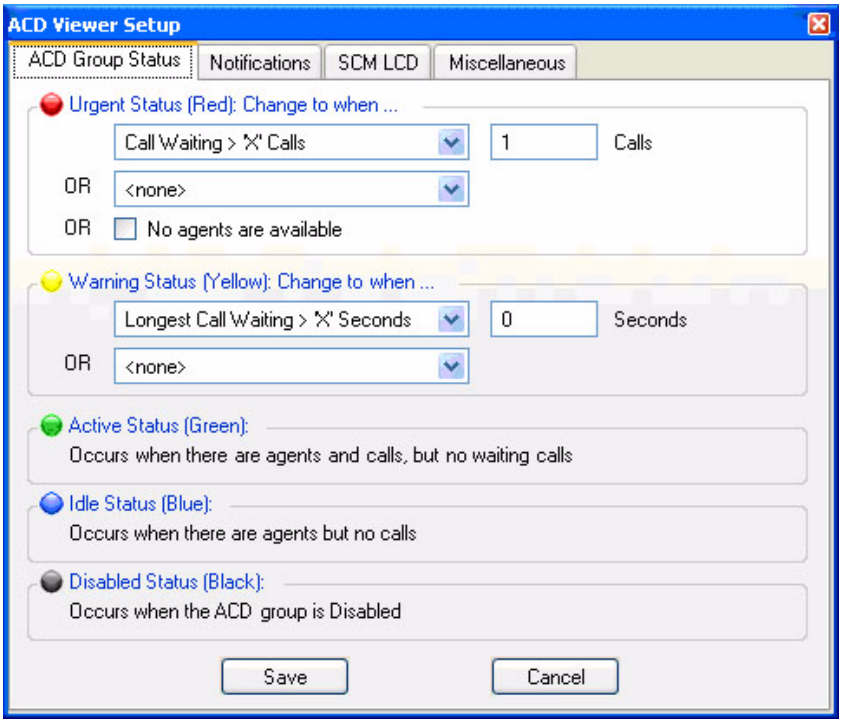
To End WrapUp

1. Click the ACD Status button.
2. Click the End WrapUp button.
3. Click Done.

The ACD View has many configuration options that allow you to customize it to your needs. When the ACD Viewer is operating and visible you can configure it's settings by clicking on the wheel icon in the upper left hand corner and selecting the Setup menu.

ACD Group Status

This section allows you to setup how ACD viewer changes ACD group status based on activity conditions. Different colors represent the different status conditions of (how busy is) each ACD group. Yellow and Red represent warning and urgent status levels respectively and can be specifically configured to decide when those levels should be reached.



Urgent Status (Red)

This is the highest level status of a queue and should typically be reached when the load or conditions in the ACD queue indicates a problem that needs attention. You can select up to two conditions so that whenever either of these conditions are met the ACD Group Status button will turn Red. In addition to these two conditions, this status will automatically be reached whenever the queue is enabled but there are NO agents available. Available conditions are:

Calls Waiting > 'x' calls

Longest Waiting Call > 'x' Secs

Waiting Calls / Agent > 'x' %

Warning Status (Yellow)

This is the 2nd highest level status of a queue and should typically be reached when the load in the ACD queue is approaching a problem level. You can select up to two conditions so that whenever either of these conditions are met the ACD Group Status button will turn Yellow. The available conditions are:

Calls Waiting > 'x' calls

Longest Waiting Call > 'x' Secs

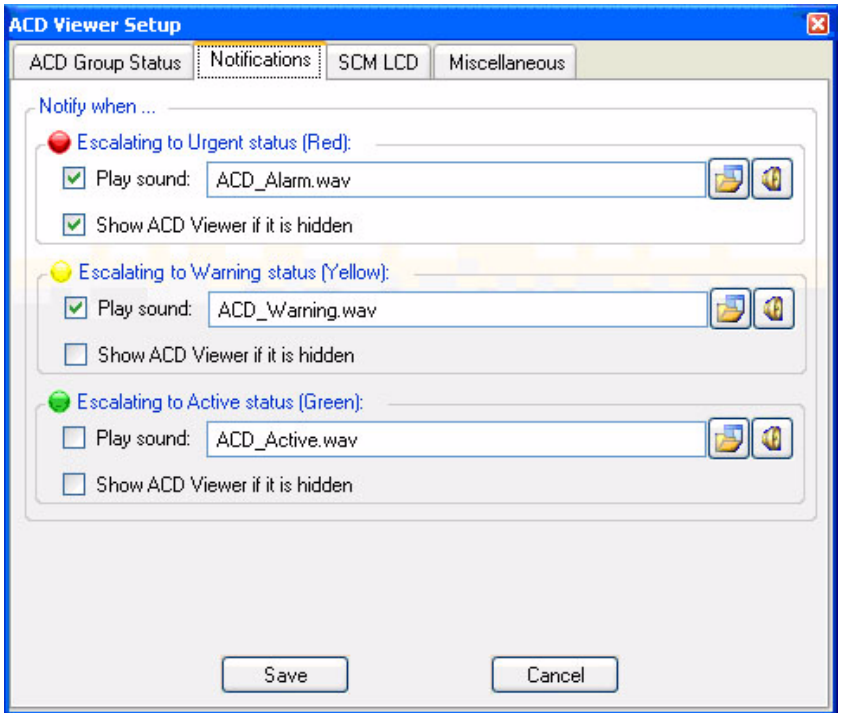
Waiting Calls / Agent > 'x' %

Active Status (Green), Idle Status (Gray), and Disabled Status (Black)

The ACD Group Status will automatically appear Green if there are agents logged into the group and there are calls taking place in the group, but there are no waiting calls for the group. The status will automatically appear Gray when there are agents available to take ACD calls, but there are no calls. Black indicates the queue is Disabled (or off-schedule) and not receiving calls.

Notifications

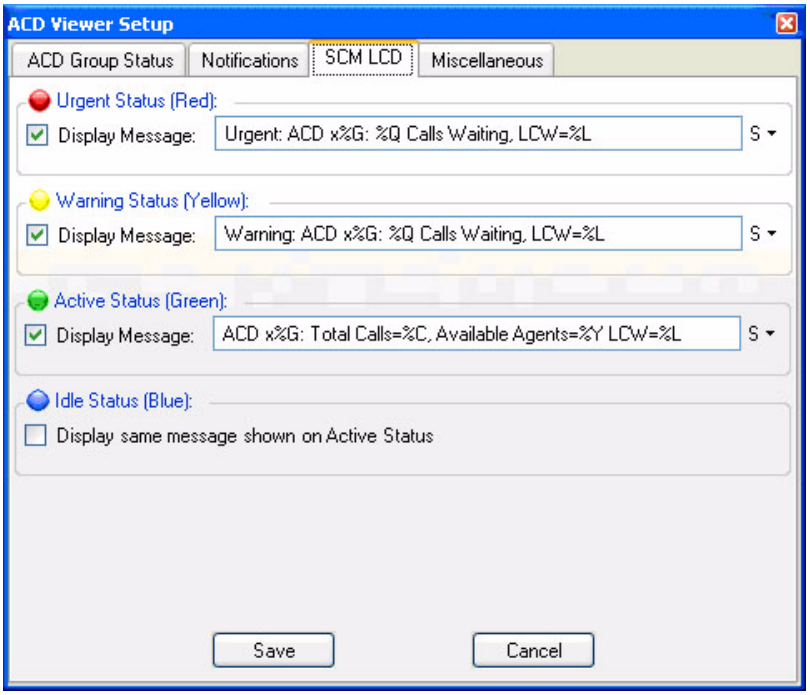
This section allows you to setup audible and visible notifications that can be taken when an Urgent, Warning, and Active status is met. If desired, enter a checkmark in the Play Sound box to hear a sound over the speakers on your PC when a status is met. Use the Browse button to browse to a specific wav file. Use the test button to hear the selected sound. Enter a checkmark in the box if you'd like to Show the ACD Viewer if it is hidden on your screen when a Status is met. This will bring the Strata Call Manager and the ACD Viewer to the forefront of your screen.



Click **Save** to save all changes.

SCM LCD

In some cases you may want to keep the ACD viewer hidden but have it send messages to the LCD display of the Strata Call Manager to show the ACD queues status. This is often very useful when the Strata Call Manager is docked to the screen and you want to conserve screen space for use by other applications. Thus, ACD Viewer can be configured to send Low/Medium/High priority messages to scroll along the 2nd line of the Strata Call Manager LCD display.



Select the appropriate check box to indicate whether or not you'd like to display a message when each ACD Group Status condition has been met.

Enter the text you'd like to display for the Urgent, Warning, or Background Messages.

Enter the text exactly as you'd like it displayed in the Strata Call Manager. Use the following tokens to represent ACD Group information.

ACD Viewer Tokens

%G – ACD Pilot Extension

%L – Longest Waiting Call

%W – ACD Group Name

% % – Percent Sign

%Q – # of Waiting Calls

%Z – Calls per agent

%Y – # of Agents Available

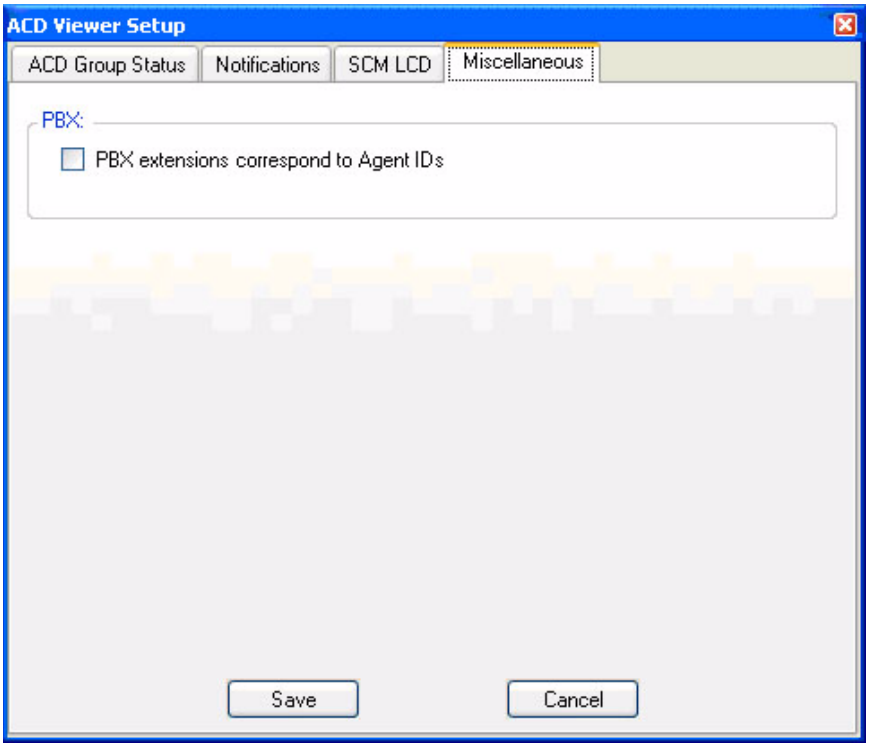
%C – Total Calls

%X – Total Agents

%G Urgent Message %Q Waiting Calls: Longest Waiting Call: %L

Miscellaneous

If on your system each Agent ID is the same as his/her PBX extension you should enable the “PBX extensions correspond to Agent IDs” option. That is agent ID “100” uses PBX extension “100”, agent ID “105” uses PBX extension “105, etc. With this type of installation, you will be able to place a chat call (or chat broadcast message) to an agent even when he/she is not Logged In to an ACD group.



Using ACD Viewer

This section describes how to use the ACD Viewer for both agents and supervisors.

Collapsed View

The ACD Viewer starts out with a ‘collapsed’ view of each ACD queue. This takes up very little screen space but still provides a high-level status of each of your ACD groups. That is, the ACD Status View window displays one line for each of the ACD Groups of which you are a member. The ACD Group Name, Queue Number, and Status (Enabled or Disabled) are displayed. If the queue is on a schedule, the time the queue will be enabled/disabled by the schedule is displayed.

Each ACD queue has an activity LED that changes colors based on the status of the queue:

Gray (Idle) = no calls active (or waiting) and at least 1 agent logged-in and available.

Green (Active) = at least one call active but no calls waiting and at least one agent logged-in and available.

Yellow (Warning) = Default: one call waiting and at least one agent logged in. But this threshold is configurable.

Red (Urgent) = Default: Two or more calls waiting OR no agents logged-in and available. But this threshold is configurable.

Black (Disabled) = the ACD queue is disabled (either by a supervisor or by being after-hours in the schedule).

To 'expand' the information on an ACD group, simply click on the Plus sign next to the status icon. Other things you can do to a queue via right-click menu include:

Chat Broadcast – Send a broadcast chat message to all agents and supervisors in the queue.

Enable Queue – Enable the queue 24x7 if currently disabled. (Supervisor only)

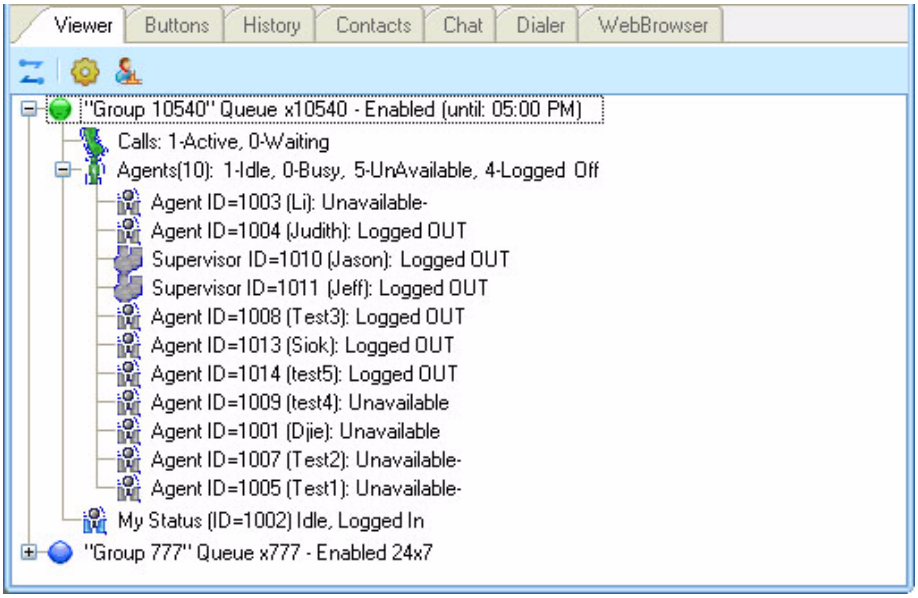
Disable Queue – Disable the queue if it is currently enabled. (Supervisor only)

Use Schedule – Enable the queue using the Schedule for the queue. (Supervisor only) *The schedule days/times are setup in Strata ACD.

Expanded View

When you want to see more detailed information on an ACD queue, you can change to the 'expanded' view. As mentioned previously, to 'expand' the information on an ACD group, simply click on the Plus sign in the status LED or right-click the group and select 'Expand' menu. In this view you see a more detailed view of: (1) Calls in the queue, (2) other Agents and Supervisors in the group and (3) your own status.

1. The "Calls" line shows the current number of Active and Waiting calls in queue as well as how long the longest call has been waiting (displayed as LCW for "Longest Call Waiting").
2. The "Agents" line shows how many total agents are in the ACD Group as well as a breakdown showing the number of Idle, Busy, Unavailable, and Logged Off agents. By clicking on the Plus sign you can further expand the view to show each agent's ID, Name, and Status. Plus the status of each Supervisor is also shown in this list. Right-click on an agent or supervisor in the ACD Group to send them a Chat message, or if you are idle, to Call the agent or supervisor on the phone.



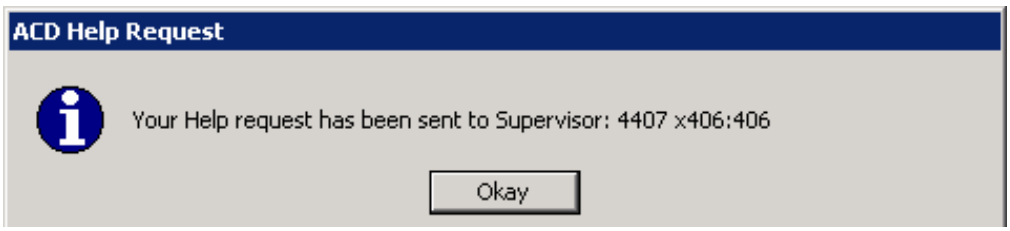
3. The last line in the expanded view is the “My Status” line. This not only shows your personal status in this ACD group but allows you to change your status and perform functions using right-click menus as described in the following section.

In the expanded view, the “My Status” icon is a special icon that shows your status in the ACD group (logged in, logged out, busy, in wrap-up, etc.), and when you right-click on your icon you can change your status or perform a function. The options provided are:

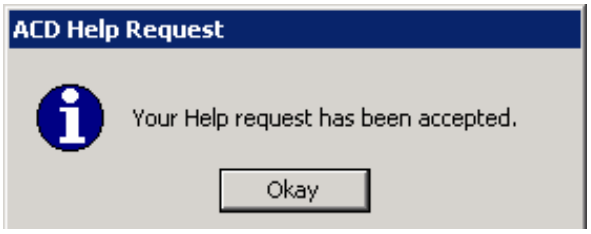
- Log In – this will log you into this ACD group.
- Log In and Take Calls – (supervisor only) – This allows a supervisor to simultaneously log in as a supervisor and as an agent (to take calls).
- Log Out – this will log you out of this ACD group.
- Make Me Available – If you are set to ’unavailable’ or are in ’wrap-up’, this will change you to ’available’ status.
- Make Me Unavailable – you can select this to make yourself ’unavailable’ – a list of unavailable message choices will be provided.
- Request Help Call to Supervisor – while you are on an ACD call, you can use this to initiate a request for a help call to a supervisor in the ACD group. This is further explained below.

Requesting Supervisor Help

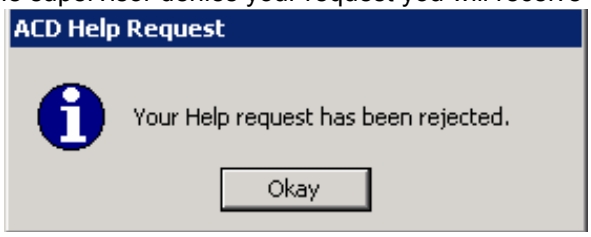
When the Request Help Call to Supervisor function is selected, this sends a Help Request to a supervisor in the ACD Group. Once you initiate the request you will receive a notification that the request has been sent.



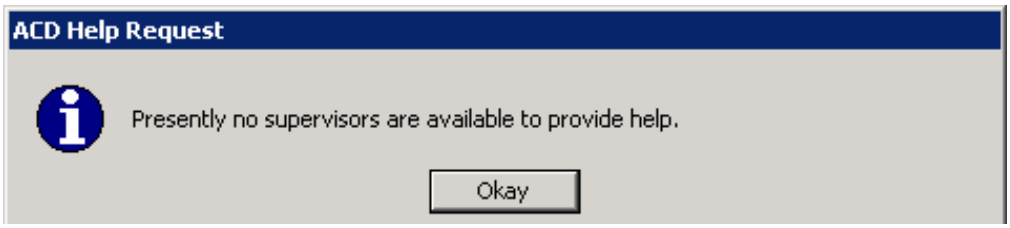
If the supervisor accepts your request for help you will receive notification.



If the supervisor denies your request you will receive a rejection notification.



If a supervisor or supervisors do not respond to your request you will see the following:



Chat

The Strata Call Manager Chat program allows Strata Call Manager users connected to the Net Server to interactively have chat conversations. This is an integrated text-messaging function that lets you communicate with other Strata Call Manager users using text messaging ‘calls’ even while you’re busy on the phone.

This program works as a companion program with Strata Call Manager to allow workers in the enterprise to communicate using real time text-based communications with others. Using Strata Call Manager Chat you can have individual conversations with anyone else on the sever with the same feature installed.

Chat can also be used to send a broadcast message to an individual or to an entire group. A broadcast message is a one-time message that will appear on the recipient’s Chat window.

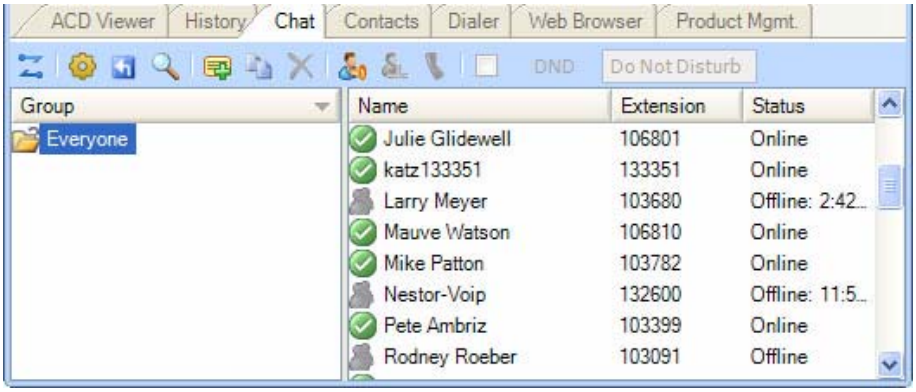
Chat Operation

The primary function of Strata Call Manager Chat is to allow you to place and receive chat calls and conduct one-on-one chat conversations with other chat users in your company. Chat also contains some features that may make Chat more user friendly in certain applications. These include a Do Not Disturb, changing the “quick send” text buttons, and the ability to form groups of users for broadcast messages,

Using Chat Messaging

This section defines how to place a call to another Chat user, how to communicate with that person, how to answer an incoming Chat communication, and how to send Broadcast messages.

- **To Access Chat** – Click the Chat tab on Strata Call Manager. The following screen will display.



To Place a Chat Call

1. Choose whom to send a message to by expanding a group in the main Chat window. If someone has logged out of Strata Call Manager Chat the icon will appear in gray, and it will show Off Line and the date and time they went off line. You cannot place a chat call to someone who is off line. The offline time is the last known offline time. If SCM was not running and a user went offline, the offline time will not show.

Note: If you do not want to receive a Chat response you can send a Broadcast Message.

You can receive a response to a broadcast by selecting the 'Give "Chat Back" option' in the broadcast dialog.

2. Double click on the person with whom you wish to converse

or Right click and choose Chat Call from the menu.

This will bring up a Silent Message Conversation window, which is used to send and receive messages opening a chat conversation. Chat can only be between two users. You cannot have a multi-way chat (more than two users). You can have multiple two-way chat conversations.

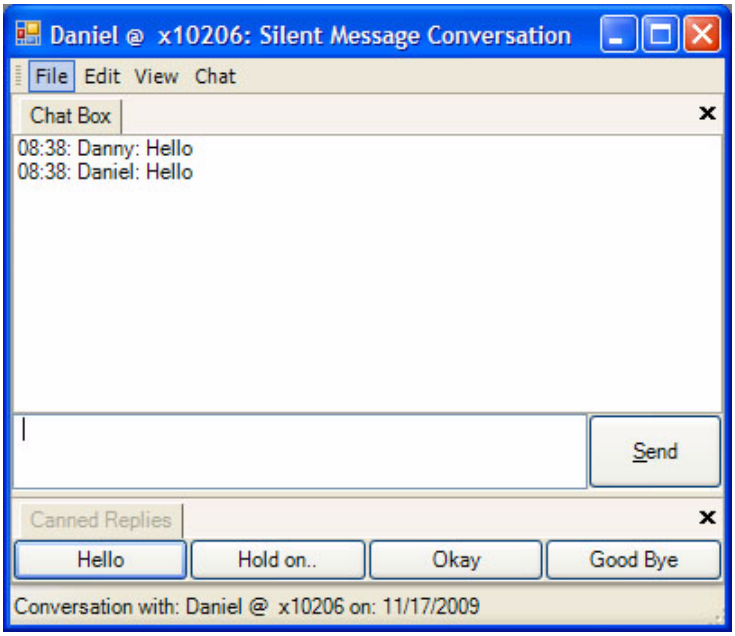
To Answer a Chat Call

1. A Silent Message Conversation window will automatically pop up showing who is calling you and a sound will play based upon your Preference Settings.
2. You must respond within 30 seconds to this message or the caller will get a message “User did not respond. However, the 30 seconds setting is configurable.
3. Ongoing conversations follow those described in To Send a Text Messageand Options During a Chat Conversation.

To Send a Text Message

1. Press a pre-programmed Response button or

   Type the message into the text box at the bottom of the window and press either the Send button or the Enter key on your keyboard (shown below).



Options During a Chat Conversation

Several options are available to the user when right clicking within the conversation window to open a menu of options. The chat window contains three windows: the Chat Box, the Canned Replies, and the Whiteboard.

The whiteboard may not be visible in the chat window (it depends on configuration). The three windows are accessed from the view menu.

To Call the Person using your Phone

This option is to make it more convenient when you need to speak with the person rather than just sending text.

- Click Chat tab, then Phone. Enter the phone number or if the number is automatically populated, then click Call.

To Copy the Conversation

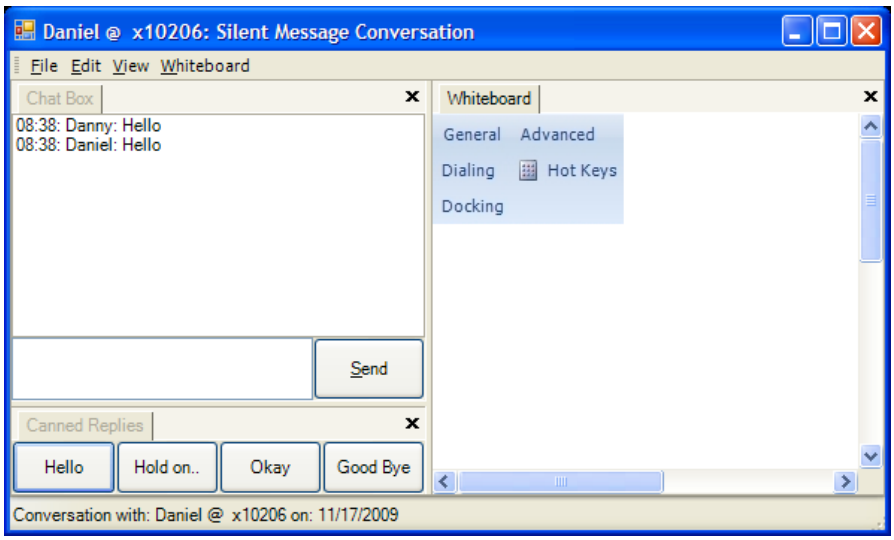
- From the Edit menu, click either Copy or Copy All to copy the highlighted or all of the conversation to the Windows Clipboard for pasting into another application.

To End the Conversation

- Press the Close button to end the conversation.

To Open a Whiteboard (Collaborative) Session

- Click Share Whiteboard Screen. This option is only offered once the called party has responded to the Chat session.



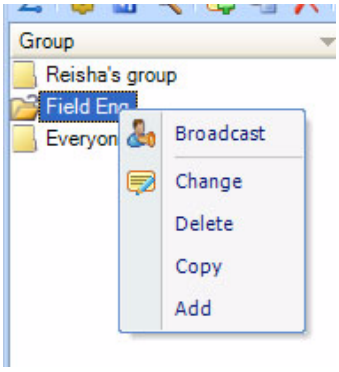
To Send a Broadcast Message

Strata Call Manager Chat allows you to send a broadcast message to one or more Chat recipients. For example, if the Sales Manager would like to call a meeting with all of his sales representatives, he could use this feature to send a message to the Sales Group telling them there is an important meeting in 15 minutes in the conference room.

1. To initiate a broadcast message, double click on any group name in the Chat Window and click on the Broadcast icon or

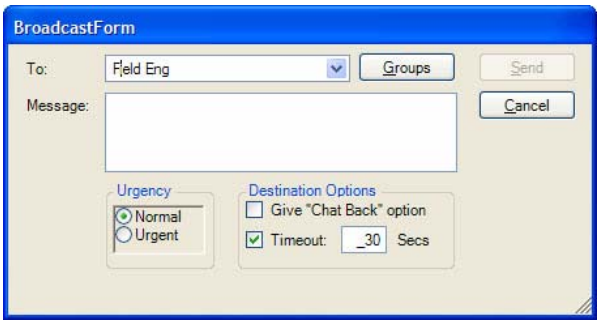
   Right click on any group name and select Send Broadcast.

Note: Personal group lists will appear within single brackets (e.g.: <My Sales Group>) and system groups lists will appear within double brackets (e.g.: <<All Sales People>>).

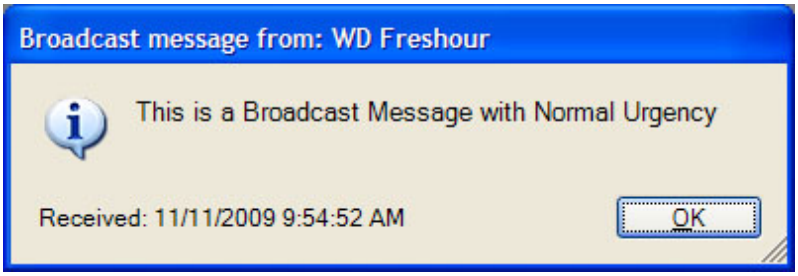


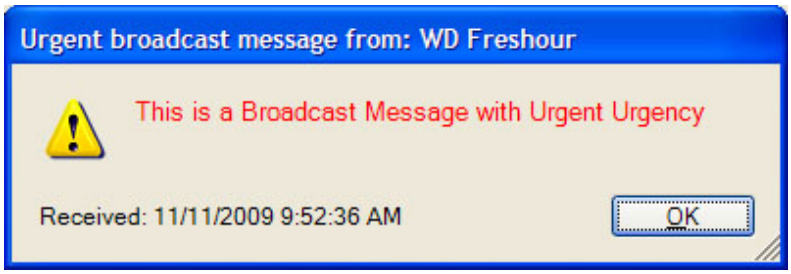
2. Enter a message into the Message box.

3. Define the Urgency, Normal or Urgent for the message delivery.



When Normal is selected, the Broadcast message is sent to your recipient(s) in black text and when Urgent is selected the text is in red (shown below).




Urgent broadcast message from: WD Freshour
This is a Broadcast Message with Urgent Urgency
Received: 11/11/2009 9:52:36 AM
OK

4. Define the Destination Options:
   - A checkmark in the Timeout (default choice) will display the message for the number of seconds defined in the time box (default is 60 seconds).
   - Entering a checkmark in the Give “Chat Back” option box will give your recipients the option to send a Chat message back to you once they receive your Broadcast Message.

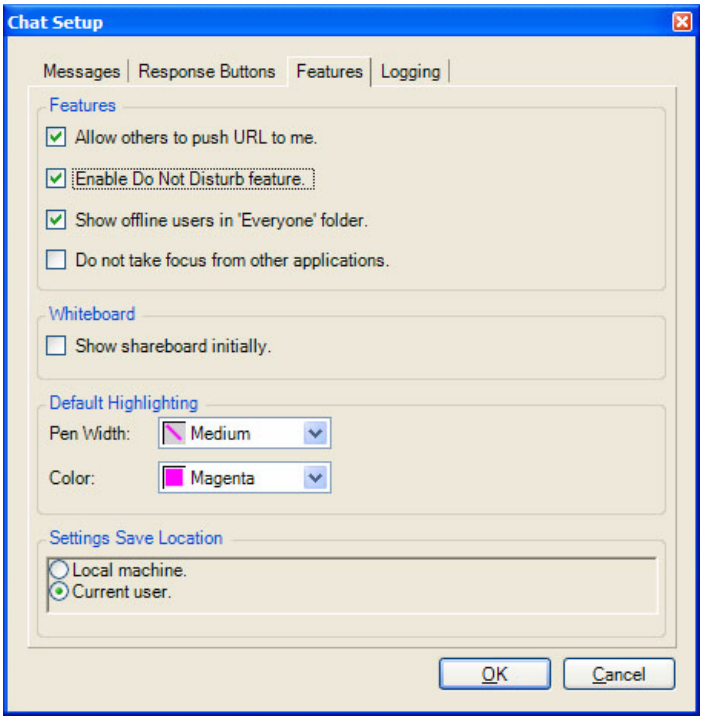
   Note Be aware that when using the "Chat Back" option sending to a group of people, all recipients will have the Chat back option and if everyone responds, it could result in a large number of simultaneous chat calls back to you.

5. Click Send.

Chat Feature Operation

Do Not Disturb

The Chat Do Not Disturb (DND) feature is disabled by default. For this feature to operate, the “Enable Do Not Disturb” feature must be selected in the Features Tab of Chat Setup. This feature works independent of Strata Call Manager’s DND. See “Interfacing with Other Programs” on page 122 for details on how to automatically link the Chat DND status with Strata Call Manager’s.



To Set Do Not Disturb

When you want to prevent further incoming chat calls, the Do No Disturb feature can be turned on. This feature allows you to provide a specific message, such as “In a Meeting Until 3pm”, to anyone attempting to place a chat call to you.

- **To go into DND status** – DND is set in the chat toolbar by selecting the DND checkbox and/or entering text into the textbox on the toolbar.

  While in Do No Disturb the main window will show the text DND On in red.

- **Other Users Experience** – When a Chat call is placed to someone who has their Do Not Disturb feature set you will see a message showing “User Not Available” along with any return message they provided. If they didn’t setup a return message, the text “Do Not Disturb” will be shown.

To Clear Do Not Disturb

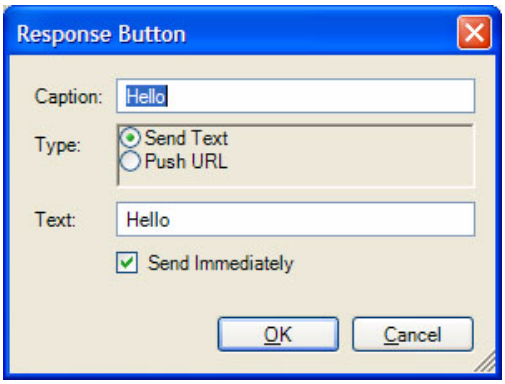
- **To Clear the DND Status** – Clear the DND checkbox..

Response Buttons

All buttons can be changed on-line from the Silent Message Conversation window. The first 8 buttons can have their responses defined in Chat Settings; all others can only be defined using the following procedure.

To Add/Change Text in Response Buttons

- Right click on the button and a drop down menu appears. Select Edit to edit the button. The dialog box shown below appears. You can change the caption, the type, the text, and whether to send immediately.

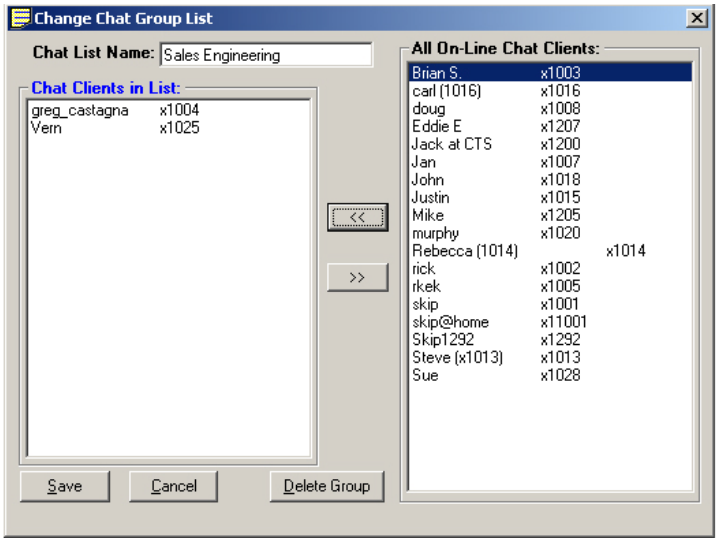


- **Caption** – Type in a caption for the button.
- **When Button is Pressed** – Select what the button will do when pressed by choosing one of the following:
- **Send Text** – will send a text string to the other party on the chat call.
- **Push URL** – will send a URL to the other party on the chat call and pop open a web browser window to that URL. However, the pop open url can be disabled by the receiver.
- **Send Text** – Type in the text message or URL you want to send when you click on this button. Your text message can be any length in size.
- **Send Text Message Immediately** – Check the box if you are sending text and you would like to send it immediately, without clicking on the Send button.
- Click **OK** to save the changes you have made to your Response Button.

Personal Groups

To Add or Change a Personal Group

- Right click a group name in the Chat window and choose either Add a New Group or, if offered, Change this Group to create a personal group. Name the group and add or remove names for that group as follows:



  - Chat List Name – Enter a name for the group to identify your group. All names must be unique.
  - Chat Clients in List – To add members to your group, highlight individuals you want to be part of your group in the All On-Line Chat Clients box and then click on the left double arrow (<<) button to move the members to the Chat Clients in List box. To select multiple individuals, hold down your Ctrl or Shift key while making selections by clicking the mouse. If you want to add a member that is not presently on-line, right-click your mouse in the "Chat Clients in List" and select the "Add an OFF-line client" menu item, then type in the name of the client.

  Note The name of the client must exactly match the client name when he/she is on-line. To remove members from your group simply highlight the members and then click on the right double arrow key (>>).

  - Click on Save when done.

To Copy a Group to Create a New Group

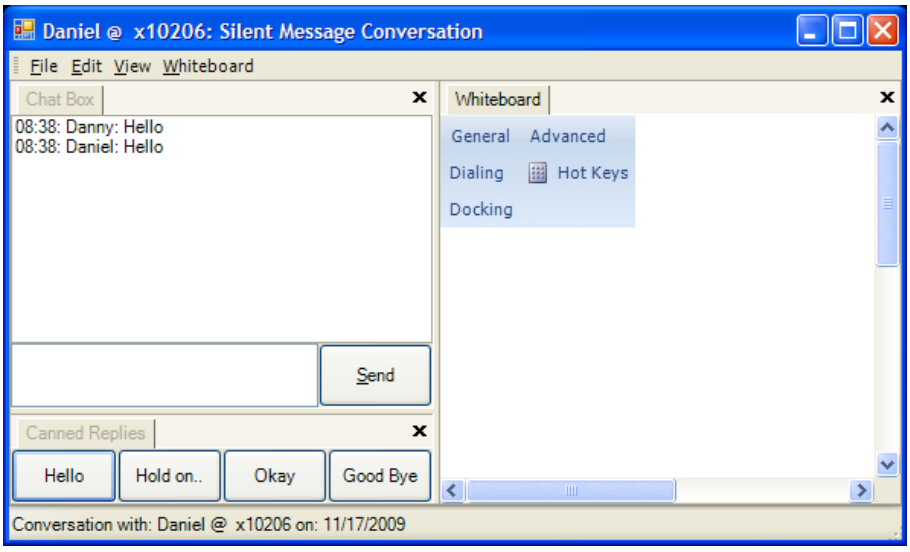
- To create a new group by copying another group, select the group to be copied, right-click on the group and select Copy this Group. Follow the same process for creating a new group above.

To Delete A Personal Group

To delete a group, right-click the group in the Chat List and choose the Delete Group option. A confirmation box will appear and needs to be affirmed before the group is actually deleted.

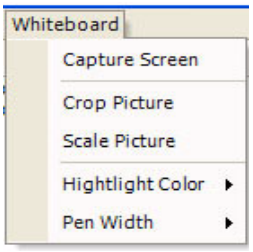
Whiteboard Operation

To access the Whiteboards option, you right click in the Chat message window, from the View menu, select Whiteboard. This window provides tools for sharing information on each of your PCs with the another user with an open Chat conversation.

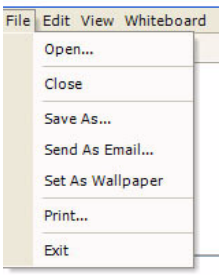


Whiteboard Menus

The menus on the whiteboard are context sensitive. The File and View menus remain constant. The whiteboard is accessed from the View menu. The whiteboard menus are accessed by right clicking in the Whiteboard space or by clicking Whiteboard. Use the Whiteboard menu to capture screens, crop pictures, scale, highlight color, and change pen widths.



The file menu has the following options:



- Open - takes you to an Open window to find a file, etc to share.
- Close - closes the whiteboard application.
- Save as - lets you save the whiteboard.
- Send as email - brings up an email message window, where the whiteboard is attached as a .jpg file and you can add you contacts in the To and cc fields.
- Set as wallpaper
- Print - prints the whiteboard
- Exit.

Similar to the above, you can use the Edit menu to cut, copy, edit, paste, delete, clear and clear highlighting.

The View menu contains Chat Box, Canned Replies, and Whiteboard.

Drag and Drop Files

Files can be shared using the Whiteboards. A file such as a .JPG file can be dragged onto the White Board window and the image will display on the other's shared window. Also, other files can also be shared such as Word documents. These files will be shared and require an appropriate application on the other PC to open that file. For example, if Word is running on the other PC, the Word document will open on the other PC. The user will be capable of using the Pen Tool to mark areas on the document when viewing the White Board screen. To make changes on the document requires switching to Word, editing the document, saving the file and then sending the edited copy back to the originator.

Send Whiteboards as Email...

Using this tool opens your e-mail service on your PC, takes a snapshot of the Whiteboards, including all pen marks, and attaches the image as a JPG file to the new e-mail message. You then can address the e-mail; create a subject and type a message to go along with the attached file.

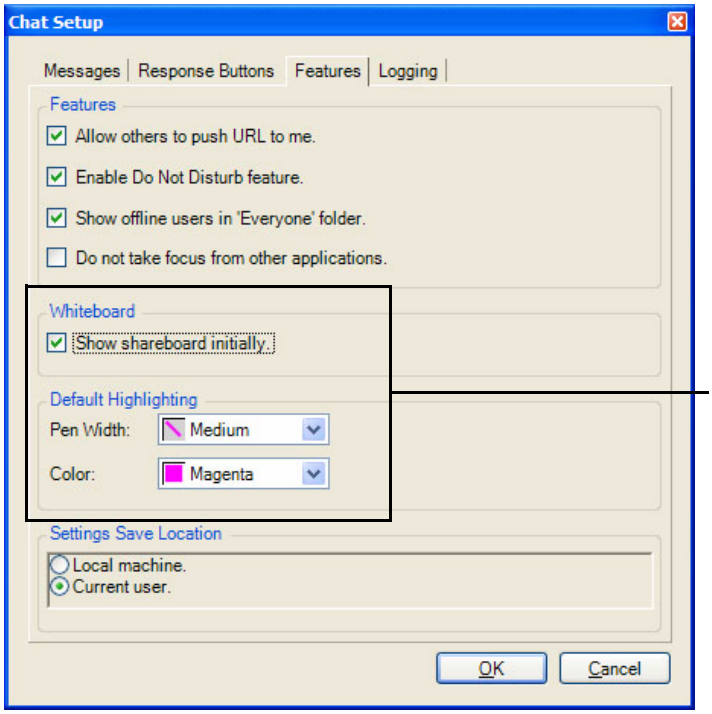
Save Whiteboards Save As...

Using this tool causes a snapshot of the Whiteboards to be saved as a JPG file. The screen opens to a "Save" window to allow you to choose the file name and location for the file to be saved. The default location is under your "...Documents and Settings/<user name>/Local Settings/Application Data/Toshiba/Strata Call Manager".

Whiteboards Setup

The Chat application Setup menu provides access to the Whiteboards Preferences screen in the Features tab.

- **Highlighting** – The Whiteboards Preferences screen defines a default Pen Width and Color to be used when Whiteboards session is opened. During a communication session, these can be changed at will as described above.



Configuring Chat

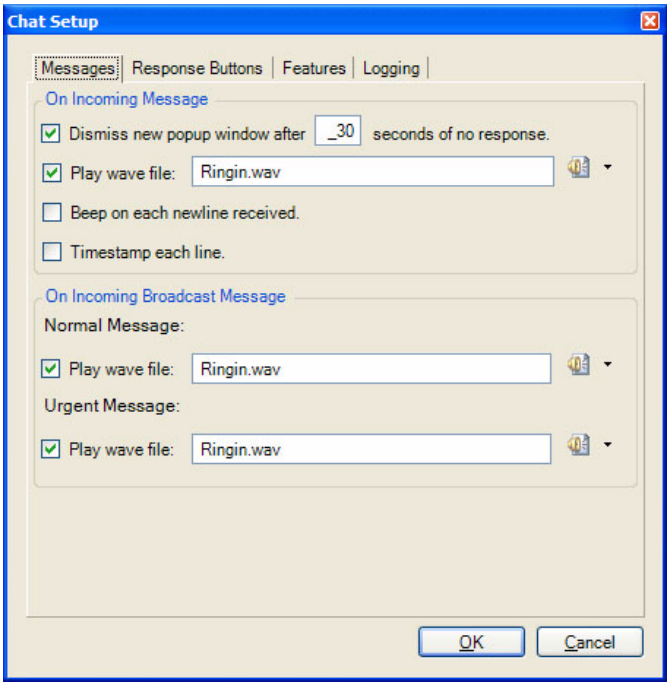
You configure Chat by making parameter choices in the Setup dialog box. You can make Chat integrate with other applications including your soft phone by using the DDE Interface commands. These are defined in the "Interfacing with Other Programs" on page 122 section later. Examples are provided for using these commands with Strata Call Manager are also included.

Setup

To set up your preferences, click the Setup button.

Messages Tab

These settings define the arrival responses provided for incoming and broadcast messages.



On Incoming Message

- **Dismiss new popup window** – Check the box and specify the time (in seconds) when no response is seen when a new message arrives. This will tell Chat to notify the caller of no response after a certain length of time. The response message returned is "User didn't respond."
- **Play Wave file** – Check the box to play a WAV file each time a new message comes in. Click on Browse to specify a different WAV file. You can test your WAV file by clicking on the Test button.
- **Beep on Each New Line Received** – Check the box to have Chat beep each time a new line arrives into the conversation. Click Test to verify operation.
- **Timestamp Each Line** – Check the box to show a time stamp Message Box each time a new message is received.

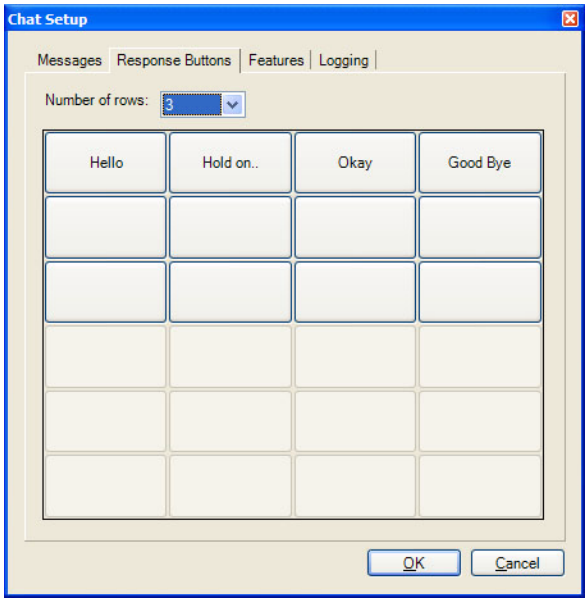
On Incoming Broadcast Message

- **Normal Message** – Check box next to “Play Wave file:” to allow playing a WAV file each time a new broadcast message comes in. You can click on Browse to specify which WAV file you want to play. You can test your WAV file by clicking on the Test button below the file name.
- **Urgent Message** – Check box next to “Play Wave file:” to allow playing a WAV file each time an urgent broadcast message comes in. You can click on Browse to specify which WAV file you want to play. You can test your WAV file by clicking on the Test button below the file name.

Response Buttons Tab

The Response Buttons are a series of buttons located at the bottom of the Chat Message Window. These can be customized to meet your specific needs by clicking on these buttons to send immediate messages to someone without typing or clicking the Send button. Once a communication channel is established, you just click the Response Button with the message you want to send.

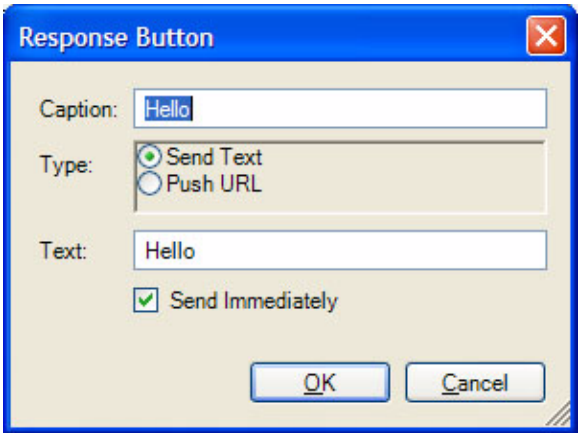
- Define the Number of rows to create response buttons.



To Change Message in Response Buttons

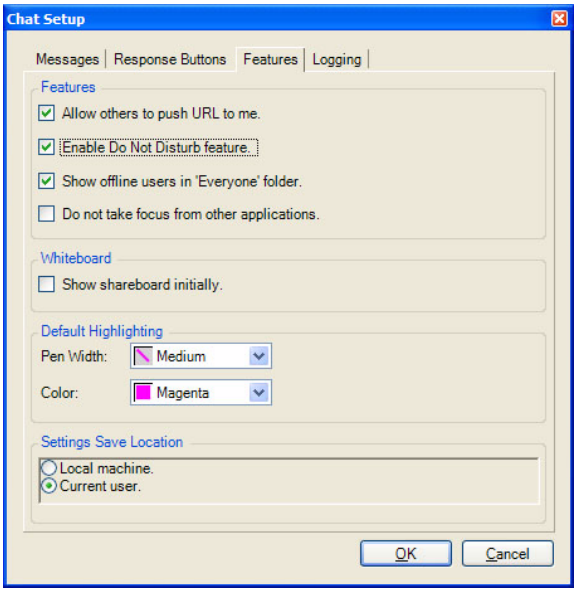
Note Only the first eight Response Buttons can be changed from the Preferences window. All buttons can be changed on-line when in a conversation. The procedure to change a button is identical in the Preferences Window as when done on-line.

- Click the Setup icon in the Chat application, then click on the Response Buttons tab.
- Click the button to change and the “Response Button” window will appear:



  - **Caption** – Enter a caption for the button.
  - **When Button is Pressed** – Select what the button will do when pressed by choosing one of the following:
  - **Send Text** – will send a text string to the other party on the chat call.
  - **Push URL** – will send a URL to the other party on the Chat call and pop open a Web Browser window to that URL.
  - **Send Text** – Type in the text message or URL you want to send when you click on this button. Your text message can be any length in size.
  - **Send Text Message Immediately** – Check the box if you are sending text and you would like to send it immediately, without clicking on the Send button.
- Click **OK** to save the changes you have made to your Response Button.

Features Tab In the Features tab, two features can be enabled and the location where the settings will be saved is specified.



Features

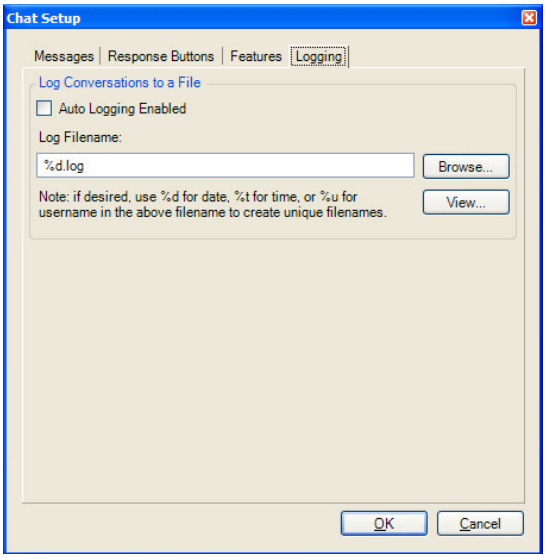
- **Allow Others to Push a URL to me** – Check to allow URL's to be pushed to this location by others. When disabled, other users cannot push a URL to open a browser window on your PC.
- **Enable Do-Not-Disturb Feature** – Enter a check mark in the box to enable the Do-Not-Disturb option. This option allows you to block incoming Chat messages and returns a DND message that you specify to the caller.
- **Show Offline Users in <<Everyone>>** – Check (default setting) to show both online and offline users in the <<Everyone>> group. Remove the checkmark to only show online users.

Save Setting

- **Save As Local Machine Data** – Click to enable this option if the settings are to apply to all users of this PC.
- **Save As Current User Data** – Click to enable this option if the settings are unique for each user of this PC.

Logging Tab

The logging tab window is used to enable the logging of all conversations to a file and define how the file is to be named.



Log Silent Message Conversations To a File

- **Auto Logging Enabled** – Enter a check mark in the box to log all Chat conversations to a file. If you do not wish to log the conversations to a file take the checkmark out of this box.
- **View Log Button** – Click the View Log button to view your current log file.
- **Log Filename:** – Enter a file name or click on Browse to select where you would like your files to be logged.
- Use the variable **%d** to log the conversation to a file name that includes the date. For example, if you had a Chat conversation on November 3, 1999, you file name would be 110399.log.
- Use %**t** for the time. The user will end up with a separate file for each chat.
- Use the variable **%u** to log a conversation to the file name of the user that you conversed with. For example, if you had a conversation with January your file name would be Jan.log.
- You can combine the use of the variables if desired. For example, the log file name could be C:\PROGRAM FILES\CTS\CHAT\%d%u.log. The log files will be defined first by date, then by the name of the Chat party. Reversing the parameters (..%u%d.log) would be organized by name then date.

Interfacing with Other Programs

Strata Call Manager Chat is designed to operate with other Windows applications. For example, a user of a phone program, such as Strata Call Manager, may want to press a button to immediately open a chat window with your ACD supervisor when you're on an Urgent Call. Or you may want to coordinate the DND settings of your phone with the DND of Chat. Or you may need to periodically send a broadcast message to a group of people based upon a trigger such as a meeting reminder. These types of operations are supported by a DDE Command interface. This section defines the format for the DDE Command Interface, its supported commands with examples with how they can be used.

Format of the DDE Command Interface

Other programs can be setup to send DDE commands to trigger actions in Chat to perform a set of functions. The basic format for this DDE command is as follows:

- Application Name: MSGPOP
- Topic: SYSTEM
- DDE Execute String: <Command>

Command 1 – Open a Chat Session with this Extension Number

Format: CALLEXT, Ext #, Msg_Type, "Message", Send_Option where:

- CALLEXT = The command name.
- Ext # = the extension number of the person to chat with. If you leave this blank, the main Chat window will pop up and allow you to manually select the person.
- Msg_Type = leave blank, future feature.
- “Message” = Message to be sent. When using Strata Call Manager, call and system variables can be used in the message.
- Send_Option = I or C
  - I – send message immediately
  - C (or blank) – type message into user buffer but wait for user to press SEND

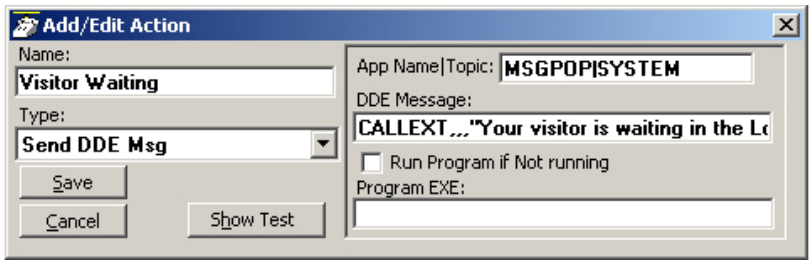
Example: The user sits at the front door and acts as the receptionist and needs to inform people when someone is waiting in the lobby.

1. In Strata Call Manager create a User Defined Action using the type Send DDE Msg and name it appropriately.

   In App Name|Topic enter: MSGPOP|SYSTEM

   In DDE Message enter: CALLEXT,,,"Your visitor is waiting in the Lobby",I

Note No extension was specified to allow the person to choose whom the message is to be sent.



2. Choose a key on Strata Call Manager, right-click and select Change Key. Name the key, choose the colors, and select a type as User Defined Actions. Select “Visitor Waiting” from the list of actions and Save.

Command 2 – Open a Chat Session with this User Name

Format: CALLNAME, "Name", Msg_Type, "Message", Send_Option where:

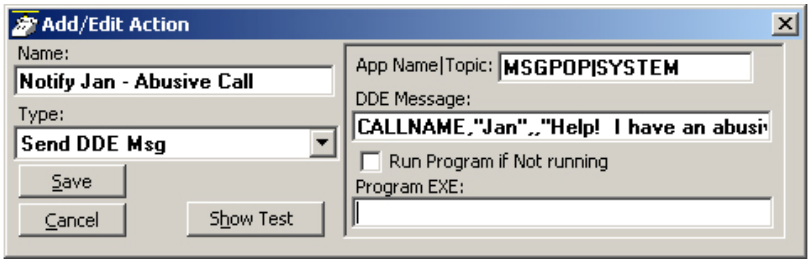
- CALLNAME = The command name.
- “Name” = The name of the person to chat with. This name must match the name used in the Chat directory. If you leave this blank, the main Chat window will pop up and allow you to manually select the person.
- Msg_Type = leave blank, future feature.
- “Message” = Message to be sent
- Send_Option = I or C
  - I – send message immediately or
  - C (or blank) – type message into user buffer but wait for user to press SEND

Example: Agents in a Call Center want to quickly notify the supervisor that an abusive caller is on the phone. The supervisor’s name is Jan and the persons phone number (formatted for easier reading) and name should be included when available using Caller ID.

1. In Strata Call Manager create a User Defined Action using the type Send DDE Msg and name it appropriately.

   In App Name|Topic enter: MSGPOP|SYSTEM

   In DDE Message enter: CALLNAME,”Jan”,,"Help! I have an abusive call from: %J/%N",C



2. Choose a key on Strata Call Manager, right-click and select Change Key. Name the key, choose the colors, and select a type as User Defined Actions. Select “Notify Jan – Abusive Call” from the list of actions and Save.

Command 3 – Set DND option on or off in Chat

Format: DND,DND_State,"Message" where:

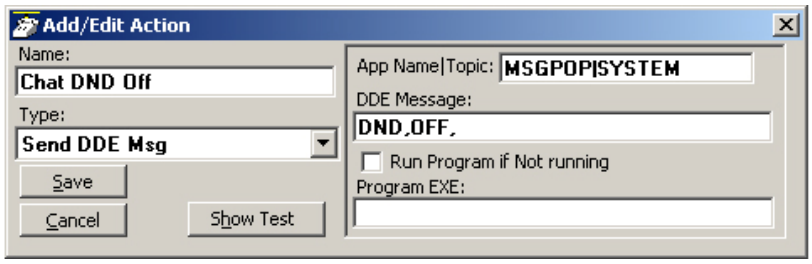
- DND = The command name.
- DND_State = Enter “ON” for turning on DND or “OFF” when turning off DND.
- “Message” = Enter the text message to be sent to callers reaching this station. If the message is left blank (opening and closing quotes only), then the message previously used will be displayed without change.

Example: The Strata Call Manager user would like to have Chat DND follow the status of Strata Call Manager’s DND status automatically when Strata Call Manager is changed. In this case, Chat should be in DND when the user is in a meeting. Chat should reflect the same message that is seen on Strata Call Manager DSS keys.

1. In Strata Call Manager create a User Defined Action using the type Send DDE Msg and name it appropriately.

   In App Name|Topic enter: MSGPOP|SYSTEM

   In DDE Message enter: DND,OFF,

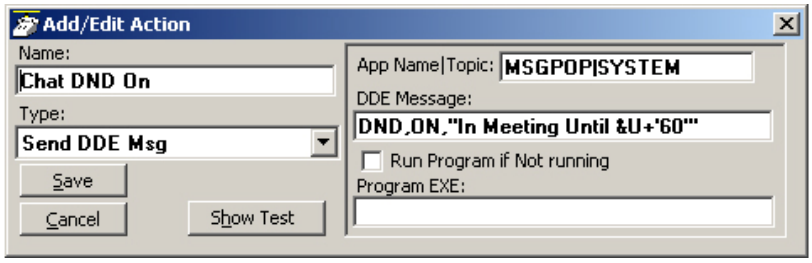


2. In Strata Call Manager create another User Defined Action using the type Send DDE Msg and name it appropriately.

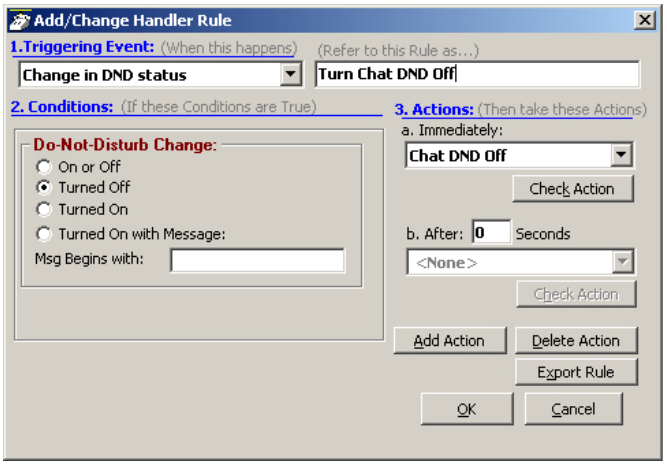
   In App Name|Topic enter: MSGPOP|SYSTEM

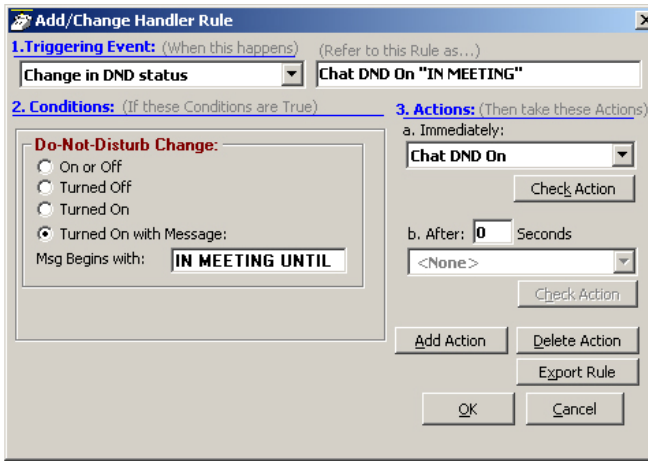
   In DDE Message enter: DND,ON,”In Meeting Until &U+’60””

Note: We are using the same time parameter used for setting Strata Call Managers DND which uses another User Defined Action that also includes &U=’60’ to set the time to 60 minutes from now.



3. In Strata Call Manager create two Personal Call Handler Rules to trigger when the DND status changes causing Chat DND to follow Strata Call Manager's DND status. The two rules are shown below.





Command 4 – Sending a Chat/Broadcast Message

Format: ONESHOT, Ext #/"Name", Urgency, "Message", Timeout where:

- ONESHOT = The command name.
- Ext #/"Name" = The extension number or name of the individual or group to receive the message. Examples:
  - Ext # = 1001
  - "Name" = "Linda", "<Tech Support>" or "<<Sales>>
  - For Everyone = "*

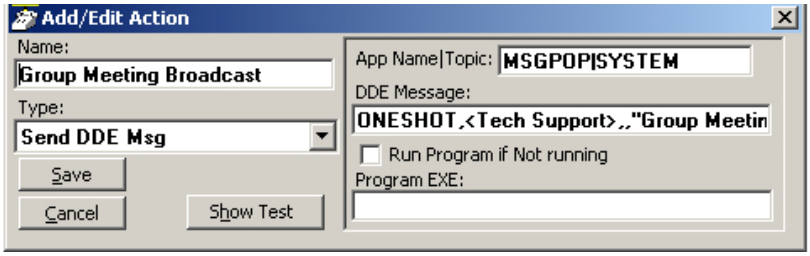
Note The broadcast group names must contain the < and > or << and >> characters as part of the name.

- Urgency = enter H if urgent message and leave blank if normal message.
- "Message" = The text message to be sent.
- Timeout = The number of seconds for popup to expire. If left blank it will be set to the default of 60 seconds.

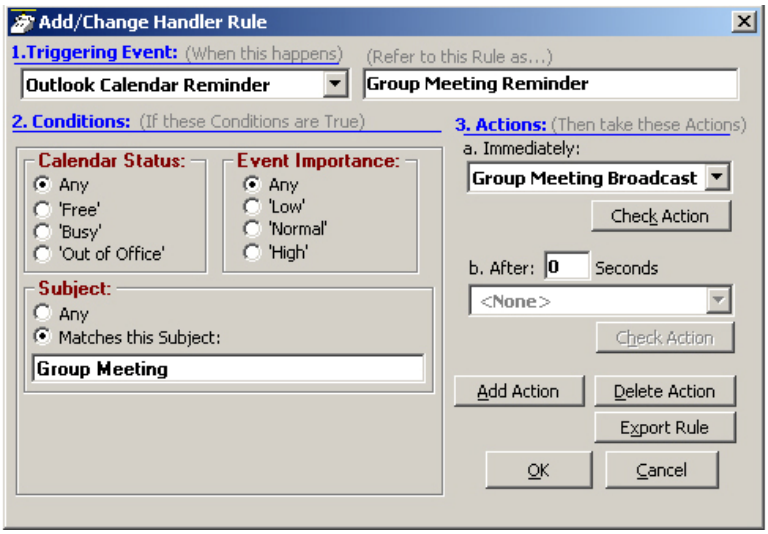
Example: The Tech Support Manager schedules Group Meetings with his staff. He wants to use Outlook to schedule the meeting and use the Outlook Reminder to send a Chat Broadcast to his group a few minutes before the meeting.

1. In Chat a Personal Group is created containing the members of <Tech Support>.
2. In Strata Call Manager create a User Defined Action using the type Send DDE Msg and name it appropriately.
   In App Name|Topic enter: MSGPOP|SYSTEM

In DDE Message enter: ONESHOT,"<Tech Support>",H,"Group Meeting at &U+'15'",60



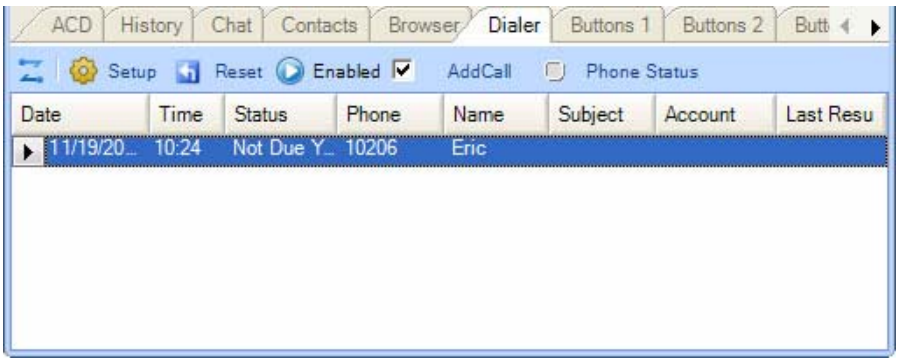
3. In Strata Call Manager creates a Personal Call Handler Rule to trigger when a Calendar Reminder event occurs and the Subject matches Group Meeting. This trigger will result in the action Group Meeting Broadcast to be taken. The assumption is the Outlook meeting reminder is provided 15 minutes prior to the scheduled meeting.



Dialer

The Dialer allows Strata Call Manager users to easily schedule phone calls to be placed later. For example, when a sales representative arrives in the morning he may know he needs to make calls to 15 of his customers, so from MS Outlook he can drag/drop the contact information of all 15 of the customers into his Dialer. When the designated time arrives for each call to be placed the user will be presented with a pop-up screen alerting him it's time to place the call. Once the call is finished, the user will be presented with another pop-up screen requesting information about whether the call was successful and if not whether it should called again later (for example if the party was busy).

The Dialer tab displays all calls yet to be placed as well as calls that have recently been completed, plus as the status of the dialers and the phone. This information is shown on the main screen similar to the following:



Main Screen

- **Fly out/Fly in button** – is used dock the window back to the main screen of Strata Call Manager or if its already docked to hide it 'inside' the main screen.
- **Setup –** Brings up the Dialer configuration screen.
- **Reset button** – Puts Dialer back to its initial state.
- **Enabled Checkbox** – This is the checkbox in the toolbar. This box indicates whether the dialer is enabled. This allows the user to easily Enable (Start) or Disable (Stop) the entire dialer function. For example, if you need to take a break to do some paperwork, you could simply disable the power dialer until you're ready to start making calls again.
- **Add Call** – Click the Add Call button to place a dialer call. The AddDialer box displays.
- **Phone Status** – this shows whether the phone is idle, busy, in Do-Not-Disturb, etc.
- **Calls Display Area** – this area shows the list of calls that have been placed or have yet to be placed (details below).
- **Column Headers** – these show what information is contained in each column. Using your mouse, you can resize and reposition these headers to customize your viewing area.

Calls Display Area

This area shows each call that is either (1) yet to be placed or (2) that has already been completed. The available columns include:

- **Date** – this column shows the date the call is to be placed or when the call was completed.
- **Time** – this column shows the time the call is to be placed or was completed.
- **Status** – the status of the call. If this is blank the call is not due yet. Other status values include:
  - Due Now – The time has arrived for this call to be placed.
  - Overdue – This call has not yet been placed and it is overdue.
  - Done – This call has been completed.
  - DISABLED – This call is disabled. It will not be placed until it is enabled.
  - In Progress – This call is underway.
- **Name** – the name of the person to be called.
- **Phone** – the phone number to be dialed.
- **Account** – this shows the account code, if any, for this call. Often an account code is used to indicate something about the call like: the customer ID, the result code of the call (i.e. “order was placed”, “needs follow-up”, “unable to reach – party was busy”), etc. This account code will be attached to the call when this call is placed.
- **Subject** – this column shows the ‘subject’ of the call. This information can be added/changed up until the call is placed, at which time this information is attached to the subject field of the call.
- **Last Result** – If the call has been placed and it is either successfully completed or will try again later, this field shows what happened on the last attempt. The user chooses these result values after each call is completed:
  - Completed
  - Busy
  - Left a Message
  - No Answer
  - Wrong Number

Functions

When you have selected an entry in the Calls you can change the entry by simply double-clicking on the desired entry.

However, if you right-click on the entry, additional menu options will appear to show other functions you may want to perform:

- **Call Now** – immediately place this call. This can be used even if the power dialer has been disabled.
- **Edit** – Allows you to Add, Change, Delete, and Copy individual entries. Entries can also be added using drag-and-drop and/or importing as described in the “Adding Calls to the Dialer” on page 132.
- **Lookup in Outlook** – lookup this number in Microsoft Outlook and open the matching contact.
- **Print Listing** – print a listing of all entries shown in the calls window. The position and width of the columns can be changed to format the printout as desired.

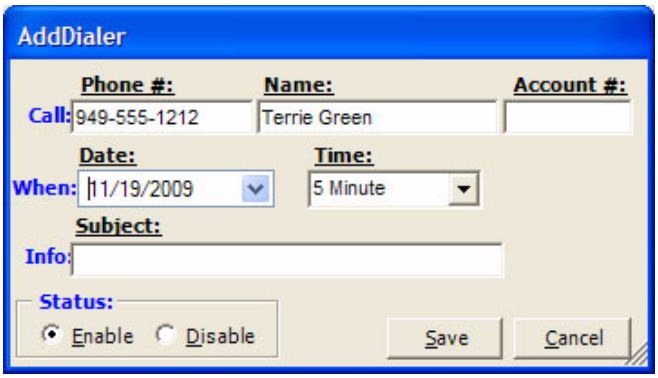
Sorting Entries

To sort the entries simply click on the column header by which you desire the sort to occur. Click the same column header again and it will switch the sort from ascending to descending (or vice versa). Thus if you want to sort-by-name click the “Name” column header, to sort by phone number click the “Phone” column header, and so forth.

Dialer Operation

Ready to Dial

Click the AddCall button to place a dialer call. The following screen displays.

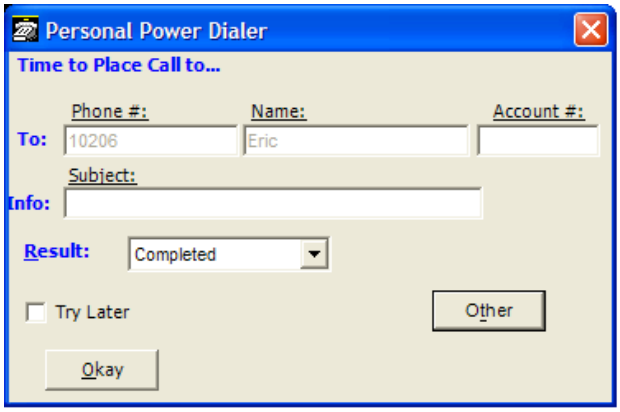


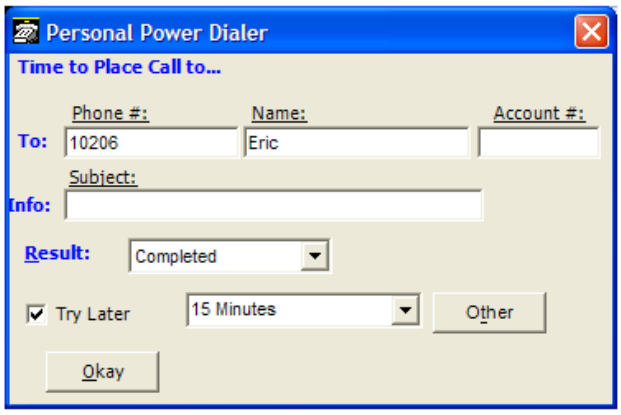
In the Date and Time drop down are used to set the date and time of your call. You also have a choice of selecting Today and Now to place a call immediately.

Calls in the list that are enabled will automatically pop up a screen for the user indicating that it is time to place the call. This screen is “Ready to Dial” screen. The screen will contain the information entered into the list about the caller and if the optional “User-defined” Action button is enabled, then pressing this key can cause more information to be available about the party or trigger one of a number of other functions. The user has the choice of Call Now or Later. If later is chosen, then you will be asked for a new time after which the call will return to the list. Pressing Cancel will disable the call before returning the call to the list.

Results When the call is completed, a Results dialog box appears (shown below). The status of the call can be changed, by default it is marked as “completed”. If the call needs to be placed again, checking the Try Again box will open a time frame for the retry (second dialog box shown below). Setting the time (an actual time or an elapsed time) and pressing Okay will place the call back into the list.

As was done in the Ready to Dial screen, an optional “User-defined” button can be provided with an action to be performed at the end of the call. This action could be anything, but typical uses would probably be to open a Journal entry or pop up an after-call survey form to take notes on the call.

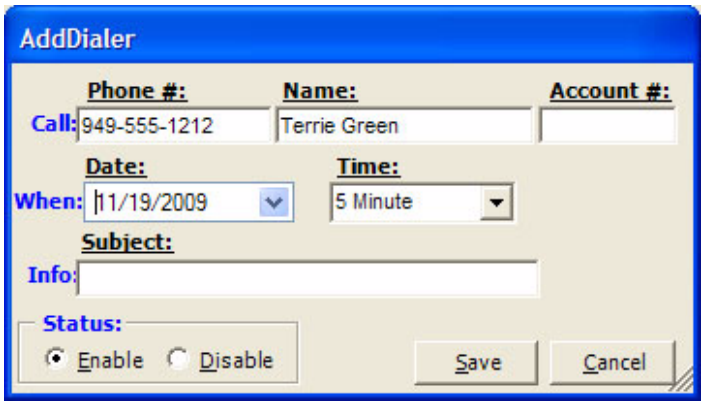




Adding Calls to the Dialer

Adding/Changing a Call Record

Calls can be added manually, imported or use drag-and-drop techniques as explained below. First, a call can be manually added or changed at any time by double clicking on a call in the dialer list. The telephone number must be entered a name being called and optionally an Account Number and any Subject as needed. The call can be scheduled by date or elapsed time. The default date is “Today”, but any date can be entered or a Calendar button is provided to pick a date for the call. Any time can be entered or any elapsed time frame can be entered. The pull down list shows some common elapsed times for placing the call. The call record will need to be enabled to be dialed at the appointed time.



Methods for Adding Calls

Often times you may want to add multiple calls from contact or call information that might be contained in other applications. The Dialer provides a couple of ways to accomplish this.

Drag-and-Drop from MS Outlook

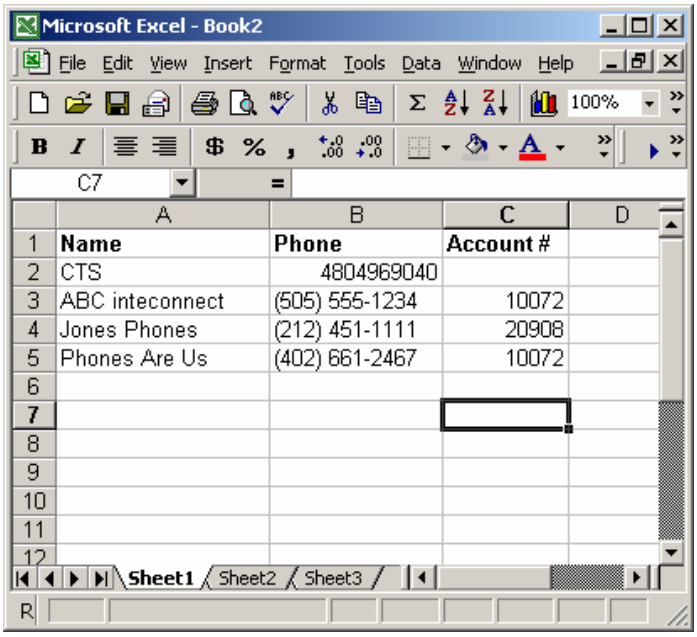
If you are using Microsoft Outlook, you can simply select one or more of your contacts in your Outlook Contacts database and simple use the mouse to drag them over and drop them on the power dials “Calls Window”. Each contact will then be individually added to the power dialer allowing you to specify the date/time of each call to be placed.

Drag-and-Drop from Strata Call Manager Call History

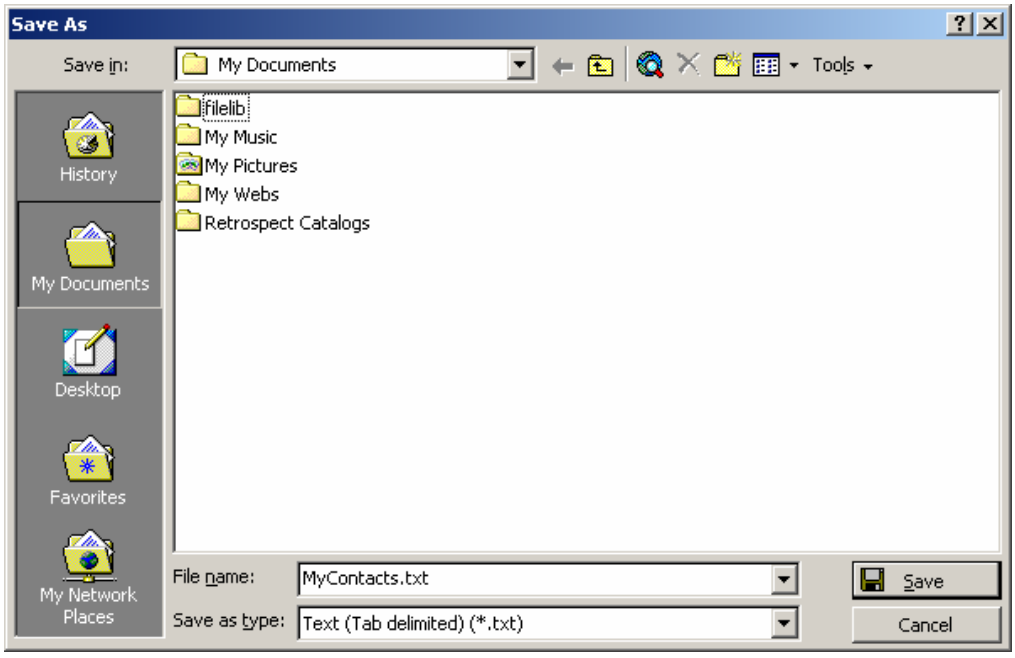
Often times you may want to place a call to someone you’ve called (or who called you) in the past. Since the Strata Call Manager call history provides a complete list of all calls placed and received, you can simply find the desired call in the call history and use the mouse to drag-and-drop a copy over to the power dialer window.

Drag-and-Drop MS Excel file

In Microsoft Excel it is quite easy to create and keep a list of desired contacts and add them into the power dialer. In MS Excel simple create a spreadsheet with at least two columns (Name and Phone number) as shown in the following example.



Then simply use “Save As” and save the file as a “Text (Tab delimited)” file, as shown in the following window. Note: The “CSV (comma delimited)” format can also be used.



Then in windows explorer simple drag this file into the power dialer window and all the contacts will be immediately added to the power dialer list of calls.

Note: Alternatively, if you save this file from MS Excel directly into the "..\PDimport" sub-folder of Strata Call Manager the entries will be automatically imported into the power dialer .

Drag-and-Drop Other files

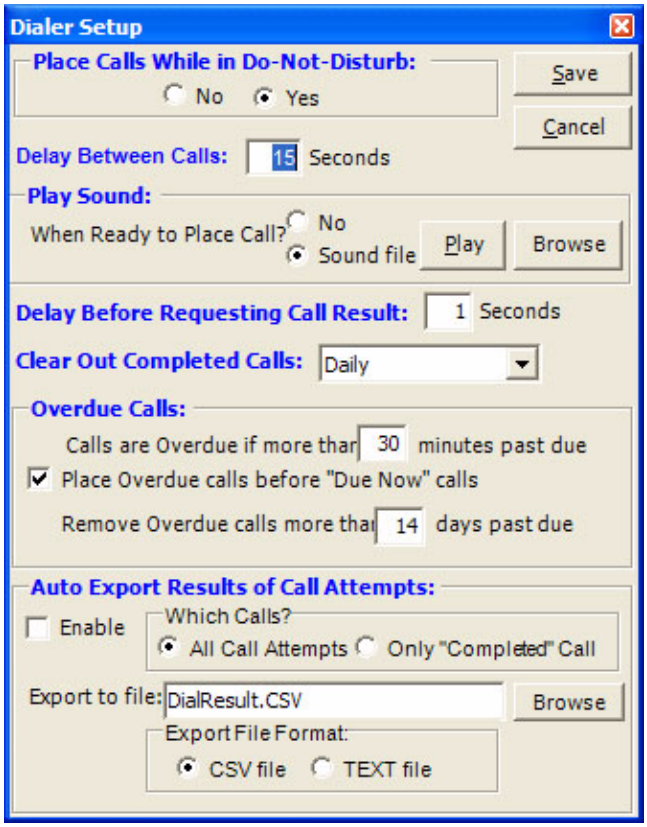
Any program that can export contacts into a "tab-delimited" or "comma-delimited" text file format can operate with the Dialer. Similar to the MS Excel file, those files can then be dragged/dropped or automatically imported into the power dialer.

Goldmine Export

The Goldmine contact management software provides a way to setup re-usable filters and export formats as well as a way to add a "Dialer (export)" button on the Goldmine screen. Using these features and the automatic import feature of power dialer described above it is very easy to send a list of Goldmine contacts directly to the power dialer to be dialed.

Configuration Settings

The Dialer provides some configuration options for the user. To view or change the configuration, right-click on the icon in the upper-left corner of the main screen and then select the "Setup" menu option. This will bring up the Setup window as shown below.



- **Place Calls While in Do-Not-Disturb** – This setting controls whether the power dialer should attempt to place calls if the user's phone is in Do-Not-Disturb. For example the user may want to set his phone into "Do-Not-Disturb" mode to stop all

incoming calls but still continue using the power dialer to place outgoing calls. Note: On some phone systems the Strata Call Manager cannot detect and display the Do-Not-Disturb setting of the phone, in which case this setting has no effect.

- **Delay Between Calls** – it's often desirable to provide some "wrap-up" time after the last call before dialing the next call. This value is used to provide this time delay between calls placed by the power dialer.
- **Play Sound** – on a sound-equipped PC, the user may want to play a selected WAV file to alert him/her whenever a call is ready to be placed. This feature and the desired WAV file can be set up here.
- **Delay Before Requesting Call Result** – it's sometimes useful to give the user some "wrap-up" to finish up some activity in another application before requesting the result of the call. This value is used to provide this time delay after the call ended before requesting the user to enter the result.
- **Clear Out Completed Calls** – When calls have been completed, they will still appear in the calls window, but they will be automatically cleaned-out based on this setting.

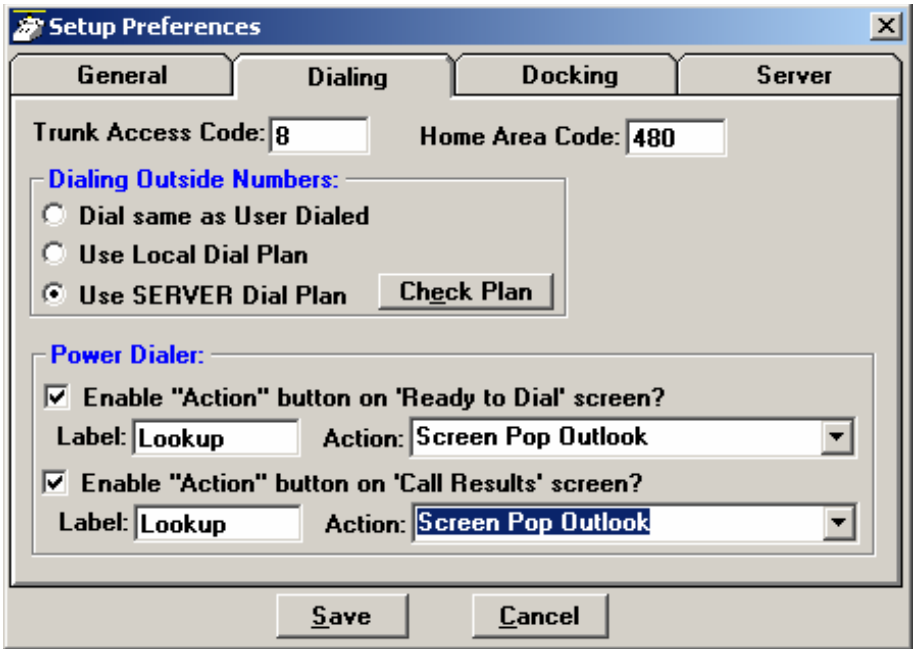
Note The Strata Call Manager provides a "Call History" feature for more permanent storage of calls placed and received. The settings options are as follows:

  - Hourly
  - Daily
  - Weekly
  - Monthly

- **Overdue calls** – when a call is due to be placed, it will only be placed if the power dialer is enabled and the phone status is idle (and possibly not in Do-Not-Disturb). Thus, since the power dialer will wait until dialing conditions are true, the date/time selected for a call to be placed may pass by, and the settings in this area pertain to those calls:
  - Calls are Overdue if more than 'x' minutes past due – This setting is used to designate how long "Due Now" calls should wait before they are considered to be "Overdue".
  - Place Overdue calls before "Due Now" calls – this option, when enabled, allows the "Over Due" calls to be placed first before the "Due Now" calls.
  - Remove Overdue calls more than 'x' days past due – If the dialer is disabled for an excessive amount of time, the power dialer will automatically clean out overdue calls that are way past due as defined by this setting.

Adding Action Buttons to Ready to Dial and Results Screens

An optional user-defined button can appear on both the “Ready to Dial” and the “Results” screens in Dialer. To setup these buttons, go to the Strata Call Manager main menu select Setup then Preferences, go into the Dialing Tab. Under the Dialer, enable either or both of the “Action” buttons and select the Action to be performed when the button is pressed. Optionally, the label can be changed to meet your needs. Press Save to keep your new settings.



Advanced Topics

Import File format

ASCII text files can be easily imported by the power dialer as long as the file format is as follows:

- One record per line with the following fields:
  - Name – Required – must be non-blank
  - Phone – Required – must have a minimum of 4 digits – can have punctuation {i.e. (480)496-9040}
  - Account code – Optional
  - Subject – Optional
  - Date – Optional – if not provided "Today" is assumed
  - Time – Optional – if not provided "Now plus 5 minutes" is assumed
- The fields within each record can be either Tab-delimited or comma-delimited, however the entire file must be one format or the other (cannot mix formats within a file). Comma-delimited fields can/should use quotation marks around any field containing a comma. For example: "Jones, Skip", 480-496-9040, 1111, "Sample 1,2,3"
- A maximum of 1000 records can be imported.

Automatic Imports

The Dialer will automatically import any file in the above-described format if the file is
(1) named with ".TXT" suffix and (2) saved into the “\PDimport” sub-folder in the Strata Call Manager folder. Once the file is imported, it will immediately be deleted.

Buttons

All buttons in the Strata Call Manager are created equal so that any button can be programmed as any other button. The More Buttons companion application also be used for ACD functionality. Each Button companion application can be assigned one of the 8 global banks, which each have 64 buttons. You can have eight instances of the More Buttons companion applications to ensure that you have enough buttons in Strata Call Manager. All buttons can be programmed by the user for the following:

- Feature Code
- Speed Dial
- System/PBS Commands
- User Defined Actions
- ACD keys
- DSS Extension Key
- Web Key
- Run Program

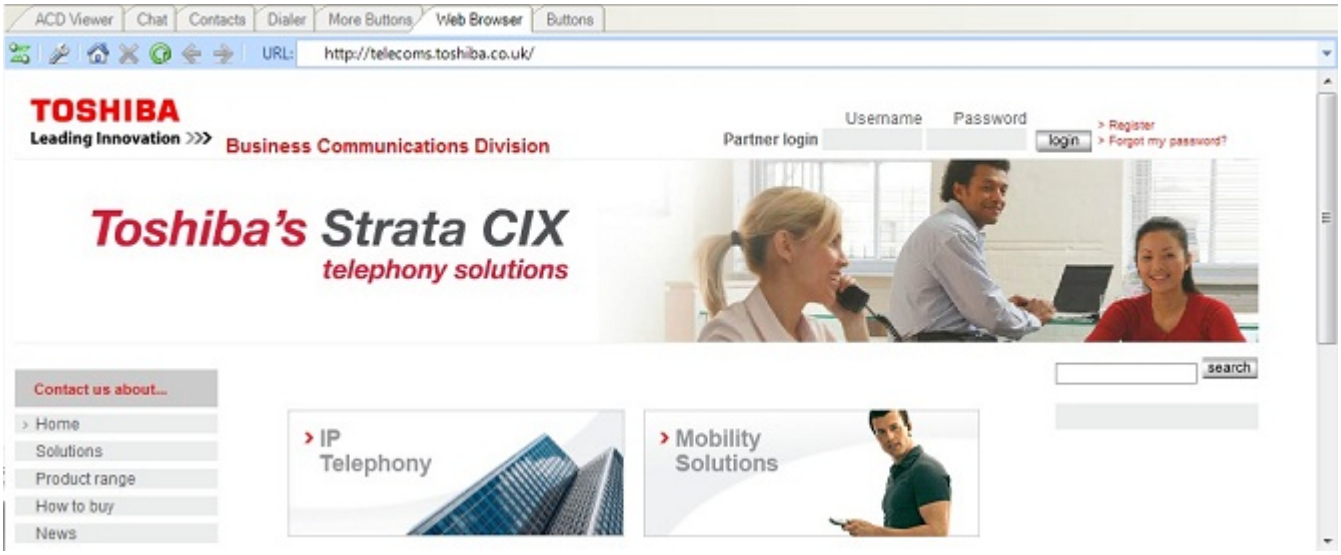
For more information, refer to Chapter 4 – Buttons.

Web Browser

Strata Call Manager provides an integrated web browser window for access to Internet or Intranet locations, or direct access to local HTML files. In addition to basic browsing, you can create custom web applications to extend the functionality of Strata Call Manager for your business.

For example, your call center could have incoming calls automatically open the Strata Call Manager browser window to a “Caller Survey” page. The Call Survey page could display information about the caller and display an answering script the agent could use to guide the conversation. The web page might also allow the agent to enter answers from the caller into HTML forms and submit the results to a company web server.

The Strata Call Manager Web Window is based on Microsoft Internet Explorer. You must have Internet Explorer 6.0 or higher installed on the PC.



Click the setup icon to set Home URL and the tools to display in the toolbar (home, stop, refresh, go back, go forward, URL).

- End of Document -